University of Alberta

Marketing Continuing Education: Perceptions of Program Planners and Educational Consumers

by

Sandra E. Jewell

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in partial fulfillment of the requirements for the degree of
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in
Adult and Higher Education

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The undersigned certify that they have read, and recommend to the Faculty of Graduate Studies and Research for acceptance, a thesis entitled **"Marketing Continuing Education: Perceptions of Program Planners and Educational Consumers"** submitted by Sandra E. Jewell in partial fulfillment of the requirements for the degree of Master of Education in Adult and Higher Education.

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To my father, Jack Jewell, who taught me how to "plan your work and work your plan" both in marketing and in life.

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To my children, Christopher, Glenn, and Brendan, who took over the household chores; and whose love, support, and encouragement made the completion of this degree possible.

Abstract

The problem addressed by this study was to identify the perceptions of program planners and educational consumers as to what constitutes effective marketing for general-interest programs in a public school continuing education unit in Alberta.

Research questions that attempted to elucidate the similarities in and differences between the perceptions of these two groups provided direction in pursuing this problem. The age and gender of the educational consumer were also incorporated in the research questions.

In conducting the study both qualitative (a focus group of program planners) and quantitative (a questionnaire delivered to educational consumers) methodologies were combined in a between-methods, two-phase design approach (Creswell, 1994).

Results from the study indicated that similarities and differences exist between perceptions of program planners as to what works in marketing general-interest programs and what educational consumers perceive to be important factors in attracting them to these programs. A few significant differences were also found for the variables of gender and age groups.

Based on these results, recommendations are provided for the careful alignment of the needs and wants of the educational consumer within the marketing thrust of the institution's strategic marketing plan.

Recommendations for future research in the marketing of continuing education general-interest courses conclude the study.

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CHAPTER 1

THE CONTEXT AND THE PROBLEM

Marketing of continuing education has historically been interpreted "very narrowly" (Buchanan & Hoy, 1983, p. 16). In fact, "particularly in public secondary-level institutions, marketing has had a poor image," and "having to sell the value of education was considered unnecessary—if not undignified" (Norton et al., 1987, p. 3).

Originally, academia needed only to design programs and await the arrival of students who desired to learn. Often a small brochure outlining course offerings was enough to attract the adult learner. Gone, however, "are the heady days of ever-increasing continuing education enrolments" (Calhoun, 1983, p. 17). As we near the end of the 20th century, educational institutions are increasingly considering "the application of sophisticated marketing techniques" (Buchanan & Hoy, 1983, p. 16) to attract learners to their programs.

Today the marketing of continuing education courses and programs has been thrust to the forefront as a necessity because of new economic and societal realities. Marketing can be found in the financial, philosophical, policy, and practice settings of these institutions. This increased focus on marketing has changed the issue of "Should we market?" to one of "How and how much should we market our educational wares in order to serve both the learner and the organization best?"

Across North America increased competition for the educational dollar and decreased funding levels for public institutions have often been cited in the literature as the two main reasons for the escalation of marketing strategies implemented by public continuing education institutions (Beder, 1986; Coates

& Dobmeyer, 1990; Long, 1983; Mason, 1992; Michael & Holdaway, 1992; Simerly & Associates, 1989).

Today in Alberta continuing education providers are also facing changing economic realities in the educational marketplace. Public institutions are experiencing increased competition from the sheer number of private providers and increasingly dynamic and aggressive competition within the public-provider domain. As well, changing enrolment patterns and the rapid pace of technological change are creating new educational markets that must be approached with a new marketing thrust.

Juxtaposed with this dynamic marketplace are funding cutbacks that affect both continuing education and parent educational institutions. More and more, continuing education units are required to become self-sufficient in order to survive. In Alberta in 1995 the continuing education department of a large public school board was threatened with closure because funding cutbacks to its parent organization ended any subsidization (Montgomery, 1995).

The Department of Advanced Education and Career Development (Government of Alberta) stated in its positional paper of 1994 that its budget "will decrease by 15.8% over the next three years" and that "this will directly affect publicly funded learning providers" (p. 2).

Cutbacks in funding for a parent organization mean a movement towards cost recovery for its continuing education unit. This in turn means that course fees must increase while at the same time the unit maintains or increases its educational consumer base. To continue to attract these consumers and to increase this consumer base, an expertise in marketing seems essential.

Much of the marketing expertise revealed in the current adult education literature has focused on the how-to or the methodology of marketing. There is little evidence of research concerning the comparative effectiveness of

various marketing strategies (what really works) and the identity of all the stakeholders who can provide this information (who can tell us what will work).

Two of the stakeholder groups who can provide valuable information exist in most large continuing education units. They are the program planners, those intricately involved in the creation and delivery of programs; and the educational consumers, those intricately involved in the purchasing of these same programs. Optimal effectiveness of an institution's strategic marketing plan would seem to involve the successful juxtaposition of the perceptions of these two entities.

Statement of the Problem

The problem addressed by this study was to identify the perceptions of program planners and educational consumers as to what constitutes effective marketing for general-interest programs in a public school continuing education unit in Alberta.

Research Questions

The following research questions provided direction in pursuing the major problem:

1. What similarities exist between the perceptions of the general-interest program planners and the educational consumers as to what is effective in marketing?

2. What differences exist between the perceptions of the general-interest program planners and the educational consumers as to what is effective in marketing?

3. Is the response of the educational consumer affected by gender?

4. Is the response of the educational consumer affected by age differences?

Definition of Terms

Continuing education institution: Simerly and Associates (1989) stated that a *continuing education institution* is "a subunit of a parent institution" and "must relate [its] programs to the mission, goals and objectives of the parent institution" (p. 89). Financially, many such organizations operate as cost-recovery units.

Within this parameter, and for the purposes of this study, the continuing education institution is defined as a cost-recovery subunit of a public school board that must relate its programs to the mission, goals, and objectives of this school board while delivering educational programs to adult learners in the context of lifelong or continued learning.

Marketing: *Marketing* is both an art and a science of managing exchange relationships while considering both benefits and costs to the learner and the organization (Kotler, 1987).

Marketing is also a methodology or a planned strategy that includes the four Ps of the marketing mix: product, price, place, and promotion.

For the purposes of this study, marketing is defined in the context of continuing education as the planned strategy for the marketing mix of product, price, place, and promotion by which the institution can attract educational consumers to its programs.

General-interest programs: *General-interest continuing education programs* shall refer in this study to those courses that are offered under the auspices of a public institution. They are available to all adults, can vary in length, are credit free, and do not lead to a license or diploma.

Educational consumer: The *educational consumer* shall, for the purposes of this study, refer to those adult learners enrolled in general-interest courses in this continuing education institution.

Program planners: *Program planners* are those individuals within the continuing education unit who create, design, and arrange for the delivery of the general-interest courses offered by the institution.

Significance of the Study

Much of the literature on marketing in continuing education was derived from the perspective of the marketer or administrator of such educational institutions. Little detailed research from a program-planner and an educational-consumer perspective has been available.

This study should assist in adding to the educational body of knowledge by more clearly delineating the marketing function as reflected by those most intimately involved in the process. Such information should have implications for the marketing practice of these educational institutions and should assist these institutions to make more informed decisions in their marketing plan.

Because approximately 75% of all educational consumers in continuing education classes are female (Continuing Education Services, 1995), gender information revealed by this study could assist continuing education units to develop strategies to market more effectively to both male and female educational consumers.

Educational consumers are "greying," and demographics indicate that soon the major consumers of continuing education will be those 60 and over (Simerly & Associates, 1989; Tarr, 1989). This research could provide valuable information on the preferred and most effective type of marketing for this demographic group.

Finally, as marketing is becoming more essential for adult education, this study could also provide some impetus for the inclusion of courses in marketing in adult-education graduate programs.

Limitations

Limitations of this study include the possible bias of the researcher, who is both a marketer and a program planner for a continuing education unit in Alberta.

The inability of educational consumers to comprehend fully their reasons for making buying decisions may also be a limitation of the study.

Finally, an inherent weakness of this study is the fact that only those who create and purchase these educational products will be surveyed; thus an important group of potential participants will not be included.

Delimitations

The study is delimited to a continuing education unit of a public school board in Alberta.

It is delimited to general-interest noncredit courses intended for learners interested in lifelong learning, rather than to merit-based certificates or diplomas.

Assumptions

It was assumed that marketing is a method of attracting learners to program offerings in continuing education.

It was also assumed that questions asked during the data collection would be answered truthfully.

Chapter Summary and Organization of the Thesis

This chapter has set the problem in context and within the defining parameters. Chapter 2 provides a review of the literature from both historical and current perspectives. In Chapter 3 the methodology, which is both quantitative and qualitative in approach, is delineated. Chapter 4 presents the findings, and Chapter 5 provides the discussion of the findings, the conclusions, and suggestions for further research.

CHAPTER 2

REVIEW OF RELATED LITERATURE

Chapter 2 provides a review of the literature that has defined continuing education, further refines the definition of marketing in this milieu, delineates the marketing strategies used by continuing education, provides an historical overview of marketing in the literature of North America, and examines recent literature which related the increasing importance of marketing in an atmosphere of escalating competition and decreasing funding.

Continuing Education

Organizationally, continuing education is, according to Hanna (cited in Simerly and Associates, 1989), an educational institution which is "a subunit of a parent institution" and "must relate its programs to the mission, goals, and objectives of the parent institution" (p. 89).

Continuing education organizations exist in a wide variety of contexts, depending on their parent organization, and for the most part are educational units designed to deliver educational programs to adult learners in the context of lifelong or continued learning (Kotler & Fox, 1985; Long, 1983; Simerly & Associates, 1989). Many offerings are noncredit and are designed to increase one's effectiveness in the workplace, augment the learner skill base for everyday life, or provide for the sheer joy of continued learning experiences (Cunningham & Merriam, 1989).

Financially, most such organizations, although operating as nonprofit, are still cost-recovery units and are sometimes even income-generating units for their parent groups (Beder, 1986; Long, 1983; Mason 1992). In order to

recover costs or generate income, an institutional expertise in marketing seems to provide the needed support (Baden, 1987; Simerly, 1991).

Continuing education units attached to public education units have long suffered from a lack of marketing expertise (Mason, 1992; Michael & Holdaway, 1992).

Marketing in Continuing Education

Marketing means different things to different organizations, but according to Simerly & Associates (1989), the literature essentially has revealed three models of marketing for continuing education: traditional, exchange, and adaptive.

In the traditional model, marketing is used to persuade learners to buy the educational product. This approach is focused on the needs of the organization rather than on the needs of the learner or consumer of the educational offerings.

The exchange model, first elucidated by Kotler (1984), portrays marketing as "a social process by which individuals and groups obtain what they need and want through creating and exchanging products and value with others" (p. 4).

The adaptive model emphasizes responsiveness to the consumer, often to the point where the needs of the organization are ignored. According to Simerly and Associates (1989), today "most continuing education organizations use a combination of these models" (p. 10).

Perhaps the most visual and applicable definition of marketing in this medium is provided by Rados (1981) in his excellent book on marketing for nonprofit organizations: "Marketing . . . deals with the many methods by which A tries to get B to do his will, where B has the freedom to act as he chooses" (p. 17). Adult learners (B) have the freedom to act as they choose

and generally participate in continuing education on their own volition. Therefore continuing educators (A) need methods to attract learners to their institution; and because the competition, in terms of the adults' time, money, and other providers of education, is considerable, a methodology for attracting them is essential.

Marketing is used not only to attract learners, but also to guide program development, promotion, pricing, distribution, and market research (Beder, 1986). A marketing program is often referred to as consisting of the four Ps of marketing: product, price, place, and promotion. It is from this marketing mix that the marketing strategies are derived.

Marketing Strategies and the Marketing Mix

Marketing strategies in continuing education are the strategic plans that the organization makes in order to attract learners to its programs, while maintaining an overall approach which falls within the realm of both the continuing education unit and its parent organization (Beder, 1986; Cunningham & Merriam, 1989; Gessner, 1987; Simerly & Associates, 1989). The marketing mix of the four Ps of product, price, place, and promotion must be driven by an overarching strategic plan of marketing for the organization to be successful. Following is a discussion of the strategies associated with each of the four Ps of the marketing mix and a listing of the components of each of these Ps as revealed in the literature.

Strategies and Components of the Product

To make product decisions, the continuing education institution must decipher the needs, wants, beliefs, and preferences of its learners. It does this through formal or informal needs assessments, also known as market research.

Surveys, questionnaires, and structured interviews are all formal strategies utilized to measure the degree to which an hypothesized need exists. Informal assessments, however, are more readily available and accessible to the continuing educator. These include informal interviews with students, instructors, and employers; analysis of enrolment statistics; feedback from meetings; observation of classroom situations; and questionnaires that follow classroom activities (Baden, 1987; Beder, 1986; Hanson, 1991).

Also essential in product delineation is market segmentation. In this process the potential market is divided into subgroups according to similarities in how they are expected to react to the programs offered. The three sets of variables often used in segmenting or targeting markets are geographic (distance, location), demographic (age, sex, income, prior education, occupation), and psychographic (lifestyle, personality, benefits sought) (Beder, 1986; Kotler, 1984; Simerly & Associates, 1989).

According to Beder (1986), there are both *tangible* and *core* components of the product. Tangible components include "the parts of the program visible to the learner" (p. 12). The literature listed tangible components as program title, descriptor, time of day, day of week, instructor, hand-outs, certificates offered, level of courses, variety of courses, course content and presentation, registration procedures, reputation of the institution, and "value-added" features (Beder, 1986; Brazziel, 1990; Buchanan & Hoy, 1983; Falk, 1986). Core components are "the essential benefit a learner is seeking in participation" (Beder, 1986, p. 12), such as career advancement, self-fulfillment, socializing, and learning something new.

Strategies and Components of Pricing

Pricing is an all-important strategy in continuing education in that it must align with the institution's values and credibility while maintaining both competitive and cost-effective fee schedules. Pricing decisions, according to Fischer (1986), "are critical to successful marketing, for price is a major factor in attracting participants and influencing perceptions of program quality" (p. 73).

The first step in pricing, however, is always to determine the pricing objective; that is, the income goals of the organization. Is break-even sufficient, or is maximization of income the most important factor? Can one program's losses be offset by another's gains? Within this framework of goal-oriented pricing, the continuing education institution must also posit, "What will the market bear, and how much are the competitors charging?"

Within the literature, components of price are listed as reasonable or affordable cost, competitive price, value for money, payment options, discounts, special prices for groups or populations, tax deductions, and origin of payment, or "employer pay" (Simerly & Associates, 1989).

Strategies and Components of the Place

Place, or location, the third P in the marketing mix, is often neglected in planning. This is not wise according to many adult education experts. Knowles (1970) advocated providing good facilities that are congruent with the principles of andragogy and noted that there are potentially both tangible and symbolic benefits associated with location. Often, according to Mason (1986), "the location of continuing education programs receives less overall marketing effort than it deserves" (p. 85).

Important aspects of the location of continuing education programs in all such organizations are the actual placement of these programs in a physical location and the relationship of this placement to the desired marketing image. Both placement and image must fit within the mission and strategic plan of the organization. Place components listed in the literature include a place that matches course requirements; is accessible, central, and safe; has adequate parking; is close to public transit; and includes a variety of locations (Mason, 1986; Simerly & Associates, 1989).

Strategies and Components of Promotion

Once the product that addresses the needs, wants, beliefs, and perceptions of identified market segments is in place, it is necessary to communicate the existence of this product to the potential market of learners. This is the function of promotion. There are five basic means of promotion: advertising; publicity; direct, face-to-face communication; atmospherics; and incentives (Falk, 1986; Hendrickson, 1980; Simerly & Associates, 1989).

Advertising is paid communication and includes brochures, calendars, direct mail, and media advertising, which can include newspaper ads, radio jingles, television spots, flyers, and even billboards. Advertising has the advantages of direct control over the message and a far-ranging reach to the masses, but the disadvantages of high cost and a low degree of perceived veracity (Falk, 1986).

Publicity is disseminated by the mass media as well. Here the message is orchestrated by the continuing education facility, but the final product is under the control of the media. The cost is low, but the message is usually perceived as more truth laden by the learner in that is appears as news, not advertising (Falk, 1986; Simerly & Associates, 1989).

Direct, face-to-face communication includes orchestrated word-of-mouth communication and direct selling. Because this is two-way communication, it can carry complete messages and be very effective because the message can be tailored to the potential client's responses (Buchanan & Hoy, 1990; Falk, 1986; Simerly & Associates, 1989).

Atmospherics are embodied in the messages that the program's location or institution conveys. Incentives are features of economic value added to a program to increase its appeal; for example, price incentives or discounts (Falk, 1986).

The Overarching Strategic Marketing Plan

With the completion and implementation of these basic marketing formulae, the next step is to position the institution in the marketplace. As Smith (1986) warned: "A major weakness of contemporary continuing education is that all too often we attempt to be all things to all people" (p. 19). The institution's philosophy, mission, and goals must be combined with a thorough knowledge of resources, strengths, and weaknesses for the most accurate market positioning (Simerly & Associates, 1989).

Willard and Warren (1986) noted that this market position must also be viable: "While committed to the overall goal of providing quality education, continuing education must at the same time achieve the objectives of all small businesses: service, profit and growth" (p. 29).

In market positioning the competition is analyzed in order for the institution to determine the most probably successful niche in which it might operate. Some considerations are the prestige of the institution, the price of its offerings, and the content of the program. Thus, the learner may want and

need the program and believe that it will satisfy the essentials, but the learner must prefer the program to others in order to register in it.

Market position determined, the continuing education facility then follows four strategies: penetrating or increasing business in an established market, developing a new market for an existing product, developing additional products for an existing market, and seeking new markets for new products (Falk, 1986). The marketing strategies as identified in the literature defined the research tools that were designed to explore the problem of this thesis.

Marketing strategies, as applied in this milieu, have dramatically increased in design and complexity over the past two decades in order to reach such a level of sophistication. To understand this evolution more fully, it is necessary to trace this development through an historical overview of the literature.

Historical Overview of the Literature

The historiography for this metamorphosis was found in the written annals of continuing education administrators. Major sources were sparse. Kotler provided the impetus for marketing in nonprofit organizations in 1975, but only two books (Hendrickson, 1980; Simerly & Associates, 1989) and one thesis (Smith, 1986) have appeared since then that were dedicated to marketing in continuing education.

Searches of periodical literature yielded numerous articles written since 1982, but a review of the literature before this date revealed little. Much of the earlier literature reflected a how-to market approach, because the idea of marketing in education was slow to catch on. In fact, until recently, "many administrators equated marketing [in education] to the sales techniques of an unsavory car salesman" (Coates & Dobmeyer, 1990, p. 17). Originally, it appears, academia designed programs and awaited the arrival of learners. The

literature of the past 10 years, however, revealed an increased focus on marketing as a necessity for survival as funding of parent organizations has decreased and competition increased.

One thought emerged from this research effort: Marketing in continuing education—at least marketing as an intrusive or dynamic thought in the minds of most continuing educators—is a recent phenomenon. It has occurred only during the last 15 years. To gain any insight from research conducted before the 1980s, one must turn to books on administration of continuing education, where the most that one can glean is that marketing was not a prime consideration during this not-so-distant era.

The following historical overview covers the decades of the 1970s and 1980s. The current decade is included in the section on the increasing importance of marketing.

The 1970s

In 1970 marketing in adult education had not yet reached the conscious level of a category; if anything, it was a footnote in most tomes. For example, in 1970 the *Handbook of Adult Education* by Smith and Aker recognized authorities in adult education, according to Houle (1992), provided only one paragraph on marketing in 594 pages. This paragraph listed newspapers, supplemental listings of courses, booklets, and directories as tools to inform the learner of course offerings, but Houle noted that "word-of-mouth testimony [is] . . . one of the best sources on what is available in adult education" (p. 403).

In Canada in 1972 Brauch discussed in his treatise *Priorities in Adult Education* the public-relations factor in planning successful adult-education ventures. To involve participants in a program, "it does not suffice for you to announce the program in the public press" (p. 212) or to create "an image with

intent to persuade" (p. 213). His idea of publicity was the "efficacy of a few well placed phone calls for help to community leaders" (p. 214).

In 1975 Kotler elucidated the virtues of marketing for nonprofit organizations. His ideas were discovered by many continuing educators and perceived by some as both applicable to and adaptable within their frameworks. His discussion illustrated how detailed technical information and well-tested procedures from the related fields of marketing and advertising could, when combined with some major value judgments, contribute enormously to decision making by nonprofit organizations and therefore, by implication, to continuing education administrations. His emphasis on marketing was heralded for being less of an intuitive or fragmentary process and more of an overall and overarching plan.

In 1978 Long and Lord noted that there was "little if any material . . . in print describing or suggesting marketing implications of continuing education" and promoted the idea that "educators can seek answers to their marketing problems from the business world" (p. 95).

It was in Langerman and Smith's (1979) book on management of continuing education programs that the first extensive listing of sophisticated marketing techniques and complete elucidation of marketing as a strategy appeared in full force. However, although these authors noted the increased focus "during the last decade" (p. 22) on promotional marketing and publicity, they still pondered the advisability and ethics of marketing in this milieu. They warned, however, that the coming economic climate of increased competition and fiscal restraint would result in more parent institutions looking to their continuing education units for financial support. These units must in turn increase their marketing to attract the volume necessary for such an endeavor. The literature of the next decade revealed this increased focus.

The 1980s

The first book dedicated entirely to the promotion of continuing education programs was produced by Hendrickson in 1980. She noted the declining enrolments of parent institutions and the need for continuing education units to expand their intake. To achieve this goal, she contended that it was necessary for such institutions to "do a better job of marketing their continuing education programs" (p. 1). This highly practical handbook provides a blueprint for marketers rather than administrators of adult education.

It was during this time frame that the realities of selling education in a competitive business world and the increasing fiscal responsibilities of these units began to receive notice in print. Loring (1980) and Suleiman (1983) discussed in detail the increasing problem of survival and prosperity for the ever-burgeoning number of players in this arena. Klus and Strother (1982) delineated the financial issues that administrators were increasingly facing. Smith (1980) decried the fact that the "marketing continues to be equated with hucksterism by many academics" (p. 8). "Strategic marketing" as an overarching plan was introduced (Pappas, 1986). All these writers suggested that an expertise in marketing was needed for the continued financial strengthening of both parent and continuing education units.

Why has an effective marketing and sales strategy taken so long to reach the continuing education institution? It appears from these sources that marketing has been anathema to academia because of its intrinsic desire to remain within the hallowed halls of "pure" learning, unscathed and untouched by the actualities of the market economy. When the bottom line of such educational units became intricately connected to their very survival, and when the funding sources for the parent organization began to shrink, the necessity

of a dramatic rise in sales volume invoked a parallel dramatic rise in both the quantity and quality of marketing initiated within these once pristine walls.

By the mid-1980s marketing was becoming a force in many continuing education units, as evidenced by the increasing number of articles dedicated to assisting continuing educators in selling their services. A full issue of *New Directions for Continuing Education* was devoted to this subject; a thesis appeared (Smith, 1986), and by 1989 Simerly and Associates, prolific writers in this vein, produced their Bible for the industry, the *Handbook of Marketing for Continuing Education.* Since the mid-1980s, the literature has focused more on the need for an increase in marketing sophistication as a response to the new economic realities impinging on the world of continuing education.

The Increasing Importance of Marketing

One of the first major articles to appear in the literature noting this phenomenon was by Fischer in 1986. "Increasingly, continuing education programs are required to be self-supporting" (p. 80), he noted, and he concluded that one of the reasons for this was declining funding for the parent organization. Beder (1986) also wrote that continuing education, due to funding cutbacks, was "increasingly [having to] finance [its] own operations through fee income" (p. 1). Cunningham and Merriam posited in 1989 that "funds in real dollars, for adult and continuing education, will likely not increase for the foreseeable future, and decreases are quite probable" (p. 258). It seems from the literature that increasing levels of self-support are the future for most continuing education units.

The concept of self-support is often misunderstood. At what level is an institution actually self-supporting? Anderson and Kasl (1982, pp. 66-69) provided a clear formula by grouping recovery costs at three levels. The first

level includes out-of-pocket expenses, such as instructors' fees, materials, rentals; the second level adds administrative costs; and the third adds any overhead not directly linked to specific continuing education programs. At level three an institution is truly self-supporting. In the 1990s, as revealed by the literature, more and more continuing education institutions have been required to reach level three and even to go beyond that to provide income to their parent organizations.

Periodical literature continued to abound with advice on the marketing concept (Beder, 1992; Hanniford, 1993), critical issues (Simerly, 1991), ethical issues (Martel & Colley, 1986), marketing and participation (Hanson, 1991), competitive strategies (Ryan, 1993), the marketing mix (Buchanan & Hoy, 1990), and trends (Coates & Dobmeyer, 1990).

However, during this decade the literature began to identify an important trend in continuing education administration. Cost-recovery and income-generation requirements, juxtaposed with funding reductions, were increasing the need for the quantity and quality of marketing strategies (Beder, 1992; Brazziel, 1990; Campbell, 1990; Coates & Dobmeyer, 1990; Mason, 1992; Michael, Hamilton, & Dorsey, 1995; Michael & Holdaway, 1992; Ryan, 1993; Simerly, 1991).

In Alberta during the past five years, funding cutbacks have affected and are continuing to affect adult public education, which includes both continuing education and its parent institutions. The Department of Advanced Education and Career Development has announced a 15.8% funding decrease over the next three years, which "will directly affect publicly funded learning providers" (p. 2). Continuing education units attached to public school boards have been asked to become totally self-supporting or close their doors. Today continuing education units, many of whom have been mired in the traditional approaches

and monetary mind-frames of subsidies and grants, are increasingly required to escalate their marketing strategies in order to compensate for the decrease in their funding levels. In Alberta the need for these units to become self-supporting, and even to return a profit, is indeed a reality.

Summary

Chapter 2 provided a delineation of marketing methods and strategies in continuing education and historically traced the increase in these methods and strategies over the past three decades.

The literature revealed that in today's continuing education milieu, increased competition and decreased funding have resulted in marketing being perceived as a necessary survival tool for these institutions. What the literature did not reveal was any emphasis on the program planner as an important stakeholder in the strategic marketing plans of the continuing education institution.

CHAPTER 3
METHODOLOGY

Introduction

This chapter presents information on how the study was conducted. A review of the research problem is followed by a description of the research design and supporting literature for this design. A brief summary leads to Chapter 4, which reveals the full results of the study.

Review of the Research Problem

The problem that this study addressed was to identify perceptions of program planners and educational consumers as to what constituted effective marketing for general-interest programs in a continuing education unit of a public school board.

Research questions that attempted to elucidate the similarities in and differences between the perceptions of these two groups provided direction in pursuing this problem. The age and gender of the educational consumer were also incorporated in the research questions.

Simply stated, this research explored what general-interest program planners thought was important in the marketing mix of product, price, place, and promotion and then compared these perceptions to those of the educational consumers.

Research Design

The research design for this study utilized both qualitative and quantitative methodologies. These methodologies were combined in a between-methods, two-phase design approach (Creswell, 1994). A brief literature review on the

linking of methodologies and the researcher's reasons for choosing this research design are presented below.

Linking Methodologies

The idea of linking two methodological approaches in a single study can be traced in the literature to Campbell and Fisk (1959), who employed more than one method to measure a psychological trait to ensure "that the variance was reflected in the trait and not in the method" (Creswell, 1994, p. 174). In other words, if there is a variance it is a real variance.

By 1978 the term *triangulation* had been coined by Denzin (cited in Creswell, 1994). Denzin borrowed this term from the military, where it meant "a combination of methodologies in the study of the same phenomenon" (p. 174). The concept of triangulation brings with it an assumption that bias from one source of data, investigator, or methodology can be neutralized when other sources of data, investigators, or methodologies are used.

Recent articles in the field of research have revealed a wide range of combinations being employed in research (Grant & Fine, 1992), reasons for mixing qualitative and quantitative methods (Greene, Caracelli, & Graham, 1989; Mathison, 1988; Swanson, 1992), the linking of paradigms with methods (Greene et al., 1989; Guba, 1992; Lancy, 1993), and the defining of design approaches (Creswell, 1994). A brief overview of citations in the literature on research design combinations follows.

Grant and Fine (1992) in *The Handbook of Qualitative Research in Education* cited a myriad of illustrations of combined methodologies, including even such vastly different ones as ethnography mixed with experimental methods.

Greene et al. (1989) advanced a number of advantages for the combination of methods in a single study; among them, development, where the first method used informs the second method; and expansion, where mixing methods adds to the scope and breadth of the study.

Greene et al. (1989) raised another issue: Should paradigms be linked with research methods? Should a researcher's qualitative stance, for example, mean the use of qualitative methods such as interviews and observations? Reichardt and Cook (1979) noted as well that linking paradigms with methods has encouraged researchers to choose between methods, rather than choose to combine them.

By the late 1980s a "paradigm debate" (Creswell, 1994, p. 175) was in progress. According to Creswell, "Several schools of thinking arose" (p. 176)—the *purists,* who advocated no mixing of paradigms and methods; the *situationalists,* who felt that certain methods were appropriate to certain situations; and the *pragmatists,* who advocated integration of methods in a single study and argued that a "false dichotomy existed between qualitative and quantitative approaches" (Lancy, 1993; Rossman & Wilson, 1985).

Creswell (1994) argued that "it is advantageous to a researcher to combine methods to better understand a concept being tested or explored" (p. 177). According to him, the combining of methods in research falls into two categories: "Within methods" (p. 174) incorporates different types of data collection within a methodology; for example, within the quantitative data collection, a researcher could use both a survey and an experiment. "Between methods" draws on "qualitative and quantitative data collection procedures" (p. 174).

Creswell (1994) also noted that his review of the literature has revealed models of combined designs. One such model is a "two-phase design

approach" (p. 177), in which a qualitative phase and a separate quantitative phase of the study are conducted. The advantage of this type of approach is, according to this author, that "the two paradigms are clearly separate" and "the researcher can present thoroughly the paradigm assumptions behind each phase" (p. 177). This researcher's stance was neither qualitative nor quantitative, but was driven by the desire to explore the problem most effectively and efficiently.

For this research to be effective, a pragmatic approach which utilized a between-methods, two-phase design (Creswell, 1994) was considered so that the first method would inform the second, and scope and breadth would be added to the study (Greene et al., 1989). It was also necessary to consider the researcher's resources of time and money, as well as the practical parameters of institutional involvement. Upon reflection, the researcher felt that these criteria could be met if a focus group utilizing a small number of experienced program planners were juxtaposed with questionnaire delivery to a large number (over 300) of educational consumers. After careful consideration of the needs of the research and the import of the literature, a between-methods, two-phase design approach was created.

The Between-Methods, Two-Phase Design Approach

A between-methods, two-phase design approach was used in this study. Phase 1 (qualitative) utilized a focus group for response generation. These responses were used to inform the second phase. Phase 2 (quantitative) involved the creation of a questionnaire from the focus-group information and delivery of this questionnaire to the educational consumer.

A detailed description of both phases of the research follows.

Phase 1: Qualitative/Focus Group

This section provides information on the qualitative/focus-group phase of the study. It includes a brief literature review on the history and use of focus groups, information on the parameters of the focus group as utilized in this study, and a summary of the methodology employed in the focus-group session.

Literature on the focus group. Focus groups are often used in marketing by involving clients who "represent the target audience for a particular program" (Simerly & Associates, 1989, p. 350).

The use of focus groups as a research method was, until the mid-1980s confined to a "few collections of readings and some chapters in various handbooks" (Stewart & Shamdasani, 1990, p. 7). These same authors traced the first appearance on this technique to Merton's (1941; cited in Creswell, 1994) *The Focussed Group Interview,* which arose from radio research on audience perceptions.

Merton combined with other researchers to write books on focus group methodology and techniques (Merton, Fiske, & Kendall, 1956). Since that time others have adopted and modified the original techniques that do not include the media focus of Merton's works.

"Focus groups are, by definition, an exercise in group dynamics, and the conduct of a group—as well as the interpretation of results obtained—must be understood within the context of group interaction" (Stewart & Shamdasani, 1990).

Contemporary focus groups usually involve 6 to 12 individuals (Simerly & Associates, 1989; Stewart & Shamdasani, 1990) who discuss a topic under the direction of a facilitator. The literature stated that smaller groups may be

dominated by one or two members, and larger groups may be difficult to manage.

Based on the focus-group literature and the resources of the institution, the parameters of the focus group were defined.

The focus-group parameters for this study. For the purposes of this study it was necessary to assemble a volunteer group of program planners (from 6 to 12) who met the criteria as outlined in the research proposal. Twelve program planners in the institution met these criteria. Institutional permission for the focus group was required, and it was necessary to hire a focus-group facilitator.

This section provides information on the parameters and criteria for the components of the focus-group activity, including assembling the focus group, creating the focus-group guide, employing and preparing the focus-group facilitator, and arranging for the focus-group location. The methodology employed in the focus-group session is then revealed in its entirety.

The focus group. For the purposes of this study, general-interest program planners from a continuing education unit of a public school system were invited to participate in the focus-group activity. A letter to the continuing education institution outlined the study and requested institutional approval for the research (Appendix A). Upon receipt of this written approval (Appendix B), a letter to the program planners requested their voluntary participation. A two-page summary explaining the purpose and nature of the research was included with this letter (Appendix C).

Of the 12 program planners invited to participate, 8 volunteered. A follow-up letter was sent thanking them for volunteering and providing them with information about their rights as participants in this research project, as well as details about the session (see Appendix D).

Each individual member of the focus group met the criteria enumerated in the research proposal. Each individual had (a) worked as a program planner for a minimum of four years; (b) worked as a program planner in the continuing education institution involved in the study; (c) planned programs in more than one area of general interest; (d) been involved in some aspect of marketing programs in the past; (e) experienced the process of working within this type of group activity; (f) developed good verbal communication skills; and (g) volunteered to participate in the focus group.

The eight program planners represented a total of 64 years of program planning experience, as well as some marketing experience for their programs. Five of the planners with longer term experience had been with the institution when individual programs had been created and marketed on an ad hoc basis, with a small brochure being produced for each subject. Therefore, these programmers had direct input into the promotional end of marketing.

With the increasing popularity of general-interest programs and the expansion of program offerings, a larger, all-inclusive catalogue had recently replaced the individual brochures. Thus, the program planner's marketing involvement during recent years had focussed on the first three Ps in the marketing mix: product, price, and place. Promotion had become the task of a central marketing department.

The combined content experience of these program planners covered over 40 program areas, which could roughly be organized into the four general subject areas of business, computer training, creative and home arts, and massage and wholistic courses.

Of the eight planners, six were currently employed by the institution, and two had recently (within the last two years) left their employment with the institution to pursue other interests.

The focus-group guide. The focus-group guide was initially developed by the researcher to set the agenda for the focus-group discussion. This work was further refined with the focus-group facilitator. A copy of the final six-page guide is presented in Appendix J.

Initial work by the researcher produced a guide which articulated the roles and responsibilities of the participants in the session and delineated the questions related to the research problem and subproblems. The nine questions closely approximated suggestions in the literature (Simerly & Associates, 1989; Stewart & Shamdasani, 1990) that less than a dozen questions should be presented. The first four questions were highly structured to elicit essential information concerning the four Ps of the marketing mix:

1. When marketing your programs, what do you think is most important to communicate to your educational consumers about the program itself?

2. When marketing your programs, what do you think is most important to communicate to your educational consumers about the price?

3. When marketing your programs, what do you think is most important to communicate to your educational consumers about the place your programs are delivered?

4. When marketing your programs, what do you think are the most effective types of promotional activities?

The next two questions were highly unstructured leading questions to allow the group members to engage creatively in their answers:

5. What marketing strategy do you feel is the most successful in attracting educational consumers to your courses?

6. What marketing strategy do you feel is the least successful in attracting educational consumers to your courses?

Questions 7 and 8 were closed questions:

7. Do you think different marketing strategies should be employed for different age groups?

8. Do you think different marketing strategies should be employed for each gender group?

The final question was all-encompassing:

9. What do you think attracts educational consumers to the general-interest programs in this institution instead of another continuing education institution or a private competitor?

After these nine questions were developed by the researcher, and before the researcher met with the focus-group facilitator, the questions were piloted (March 5, 1996) with two registration and two marketing personnel within the continuing education institution. These individuals were chosen for the pilot because registration personnel are most closely involved with the educational consumer because they communicate with them on a daily basis, and marketing personnel are acquainted with the marketing procedures and issues within the institution. A copy of the letter sent to the individuals involved can be found in Appendix E.

On March 8, 1996, the information was returned to the researcher. All four individuals involved in the piloting found the proposed questions to be clear and understandable within their frameworks. No suggestions for changes were made. The following comments provide a summary of the feedback from these individuals.

Questions 1-4 were found to be "specific to the 4 p's of the marketing mix—which are what marketing really centres itself around." Questions 5 and 6 were found to be "good examples of the types of questions used to generate creative, free thinking—another key element in developing a marketing plan." Questions 7 and 8 were determined to be demographically based, and again a

part of a marketing strategy used "to target certain demographic populations." Question 9 was established as including crucial marketing elements of "thinking like the customer" and awareness of competition.

The comments from the member of the marketing team provided the strongest support for these questions: "Summing up, I find the 9 questions to be valid within the realm of marketing, and to cover essential marketing elements. I find them to be clear, concise and well-presented using a variety of questioning techniques." A copy of this letter can be found in Appendix F.

From this piloting procedure, the researcher ascertained that the questions were clear and understandable, and contained content validity. Content validity, according to Leedy (1989), is "the accuracy with which an instrument measures the factors or situations under study; i.e., the 'content' being studied" (p. 27).

In the researcher's subjective judgment, these questions also contained face validity. In other words, the questions would measure what they were supposed to measure; and the sample of program planners, with their knowledge and ability, would be adequately representative of what was being measured.

These questions therefore were useable as a starting point for the dialogue required in the focus-group work. The questions were maintained in their original format and presented to the focus-group facilitator at the pre-focus group meeting to assure that the facilitator was comfortable with and understood the questions and their intent.

The focus-group facilitator. The success of the focus group is often determined by the quality of the facilitator (Stewart & Shamdasani, 1990). The literature seemed to agree, however, that there is no one best style or type of facilitator. "Rather, both the [facilitator] and the strategy for conducting the

interview must be matched with the purpose of the research and the characteristics of the group" (Stewart & Shamdasani, 1990, p. 85).

For the purposes of this study with this experienced and verbal group, the facilitator was chosen on the basis of criteria enumerated in the research proposal: (a) educational background and training: university education at a master's level and facilitator training; (b) amount of facilitation experience: 2 years' experience in an educational setting; (c) personal characteristics: expressive, animated, insightful, flexible; has a sense of humor and is able to express thoughts clearly; and (d) authority: ability to monitor and guide the session effectively for maximum information generation.

The focus-group facilitator was hired in February 1996 and met with the researcher for three hours on March 9, 1996, to review the research problem, proposed methodology, ethical guidelines, and the focus-group procedures for the focus-group session. Appendix G provides the agenda for this meeting.

The facilitator was provided with a copy of the methodology chapter of the proposal, the review of ethical guidelines (Appendix H), letters to the institution and program planners, an agenda for the focus-group session (Appendix I), and a draft of the focus-group guide. The guide included the roles and responsibilities of the participants, as well as the research questions, with the addition of prompts to be used in the session if necessary.

Dialogue during this meeting resulted in a thorough understanding on the part of the facilitator, of the research problem, the basic focus-group procedures, the research questions, and their intent. The facilitator was instrumental in suggesting an exciting mix of tasks for presenting the questions that would both hold the interest of the program planners and facilitate the generation of multiple responses. These tasks were then incorporated into the

focus-group guide and are enumerated in the section on the focus-group session. The final draft of the focus-group guide is found in Appendix J.

The focus-group location. A suitable location, removed from the program planners' place of work, was chosen. The room was comfortable and oversized. High ceilings, numerous windows, and several arrangements of adult-sized tables and chairs provided an atmosphere in which group, paired, and individual work could be completed in comfort. Nine large, portable flip-chart holders were available and placed in positions that were easily visible to all and formed two "thinking walls."

On hand to capture the responses were:

* flip-chart paper, 9 sheets of which had the individual questions printed (one per page) in large, colorful letters; and blank paper
* recording cards (5" by 8") and felt pens
* 40 pads of colored "stickies" in five colors, one set of colors per program planner
* paper and pens for each participant and the researcher
* stick pins, adhesive tape

The focus-group session. The overall objectives for the focus group session were:

* provision of a comfortable atmosphere in which to work at the task
* orientation to the task
* presentation of the questions
* identification of ideas flowing from the questions
* efficient capture of the responses
* effective organization and focus of the responses for consensus
* reliable and objective results from which to develop a questionnaire for educational consumers

It was planned that the introductions, a review of criteria and ethical guidelines, and the initial presentation of most of the questions occur in the morning half of the session, allowing the focus to shift to response organization in the afternoon.

The session was held on Wednesday, March 13, from 9:00 a.m. to 3:00 p.m. The facilitator and the researcher both arrived early, at 8:15 a.m., to set up the room and review the research and ethical procedures. They arranged the thinking walls and distributed supplies and working agendas at the main working table, and the researcher set up at a small, round table removed from the main work area. The researcher had a copy of the thesis proposal, a copy of all documentation to date (as enumerated in Appendixes A to H), the focus-group guide, a writing pad, and several pens.

Refreshments (coffee, doughnuts, and water) were ready for the session by 8:30 a.m., and a final call confirmed that lunch would be delivered at 11:55 a.m.

The focus-group session commenced at 9:07 a.m. with all eight participants in attendance. The researcher thanked the participants for coming, noted that each participant had been provided with a working agenda and a copy of the two-page summary of the research, and introduced the facilitator by name. At 9:09 a.m. the facilitator provided a brief self-introduction and immediately commenced to set the scene for the session.

The roles and responsibilities of all participants were explained by the facilitator as follows: The researcher would be present as an observer only and would take notes, the facilitator would facilitate the session and provide directions for the generation of the responses, and the program planners would provide their perceptions in response to the nine questions in the focus-group guide and further assist the facilitator in the organization of these responses on

the thinking wall. The program planners expressed their pleasure that the researcher, a very verbal work cohort, would not be allowed to provide input and in fact would have to remain quiet!

Working from the focus-group guide, the facilitator then read the criteria for the selection of the program planners and the facilitator. All of the program planners agreed that they met the criteria.

The facilitator then reviewed the ethical guidelines for the research, working from a copy of Appendix G.

A review of the two-page summary (Appendix C) ascertained that all participants understood the purpose and nature of the research. The program planners all agreed that they understood that their perceptions of what markets a program successfully would be matched against the educational consumer's perspective of what actually attracted them to the institution's programs. They also accepted the definition of *marketing* as elucidated on p. 1 of the two-page summary.

The facilitator called for questions, and when there were none, proceeded to go through items 2-8 in the ethical-guidelines list. The right of any participant to opt out of the research during the session was reiterated. The participants were assured that the information that they provided during the session would remain anonymous and confidential and that their responses were intended for use in the creation of the quantitative questionnaire and therefore would not be identified specifically as originating from one person.

The facilitator also informed participants that following the focus-group session, the researcher and university data-entry personnel would be the only ones with access to the responses and data. This information would be kept in the researcher's home safe until the final acceptance of the thesis and then destroyed. The program planners were assured that they were subjects who

were at minimal risk on an individual basis, because group consensus would be sought in the session. They were also informed that they should perceive no threat or harm from their employing institution, because administrative personnel had been informed about and given their consent to this research and their participation.

Finally, the facilitator asked the participants for their verbal consent to disclose information on the proposed research. Seven said, "I agree"; and one said, "I do so promise, God being my witness."

With the criteria and guidelines elucidated, the task of the facilitator now turned to setting a comfortable atmosphere for the session. An icebreaker was put forth. Each participant was to follow the facilitator's modelling and inform the group where they were now professionally and where they hoped to be in five years. This proved to be an extremely successful icebreaker for a cohort group who had known each other for years. Lively conversation and a few eye-openers followed! The scene was now set for a relaxed yet energized attack on the task at hand—the questions!

The questions. Each question was presented as follows: The entire question was verbalized by the facilitator, and then the method (group, paired, or individual work) and recording material were identified.

Questions 1 through 4 explored the four Ps of the marketing mix: product, price, place, and promotion. The methodology employed for these questions was individual response generation, with no communication between group members. It was thought that this was a highly structured method of producing responses from highly structured questions. It was also surmised that this method would yield each individual's original thinking, untainted by any other individual's comments.

The responses were recorded on different-colored stickies with a pen, then attached to the flip-chart paper on the thinking wall. For product, place, and promotion, a second flip-chart sheet was added to hold all the information.

Although no discussion took place during response generation, there was some discussion at the thinking wall when the program planners attempted to form categories for their responses. Stragglers appeared and had to be moved from one chart to another.

At 10:20 a.m. a break was called to provide participants with some needed rejuvenation. The session convened again at 10:30 a.m. The participants were paired, and each pair was assigned one of the four Ps. The task was to name the categories already roughly arranged on the flip-chart papers and to put these names on different-colored stickies (than the ones already there) at the edge of the paper. After this reorganization, each team presented its categories, with feedback from the other teams. This process worked well, and the teams moved back and forth between the sections, checking on the other teams' categorization.

The method of data collection for each of the remaining questions was unique and resulted in each program planner working with all other program planners in either pairs or groups.

Question 5 (the most successful strategy) involved the planners' thinking about the question alone for two minutes, jotting down their ideas, then pairing to discuss with their partner. Agreement was not necessary. The pairs went to individual locations to discuss their strategy, then wrote them on 4" x 6" cards with felt pens. Some pairs taped theirs together. There was some discussion; then the cards were taped to the thinking wall.

Question 6 (the least successful strategy) involved group work, with each side of the table (four planners) forming a group. Each group collaborated to

produce ideas, which were recorded, one idea per stickie (any color), and moved to the flip chart. All planners were encouraged to look at the flip chart containing these items, which they did.

Question 7 (age) utilized two different groups of four (each planner at the end of the table), who brainstormed on the factors which might be affected by age. Each group then created a master list of these factors. A vote was taken on the question of whether the program planners thought that different marketing strategies should be employed for different age groups.

Question 8 (gender) involved two diagonal table groups who created two flip charts. The program planners were also asked to vote on whether they thought that different marketing strategies were required for each gender group. Presentation by each group was tabled until after lunch.

Lunch and a needed break arrived at 12:00 noon. Some of the program managers made a dash for the phones and the fax, showing that you can remove them physically from their place of work, but not mentally.

The session reconvened at 12:47 p.m.

Question 9, the all-inclusive "What attracts consumers to this institution rather than other providers?" was well placed after the ideas and the discussions of the day. This question was presented in a think-pair-share method of delivery. Individual thought was followed by pair formations (this time cross-diagonal), with each pair then recording their responses on a flip chart and presenting them to the group.

The final task involved revisiting the first four questions on product, price, place, and promotion. Each pair reviewed for the entire group the P on which they had worked in the morning session, explaining how they had broken down their P into sections. After each review, all program planners commenced to rank each section for importance according to their own individual perceptions.

They did this by "spending" a total of 15 points by assigning the numbers 5, 4, 3, 2, and 1 to their top five preferences, with 5 being the most important number.

At the conclusion of the session each participant was thanked verbally. The facilitator then provided the researcher with all the information gathered and debriefed with the researcher for half an hour. The researcher then began the work of analyzing the focus-group information.

Analyzing the focus-group information. The following were assembled: (a) all written information on cards and flip-chart sheets; (b) personal observations of the facilitator, in written form, from verbal debriefing; (c) personal observations of the researcher-observer, noted in written form during the session; and (d) reflective observations of the researcher-observer beginning in the first hour following the session.

Then information reduction, inference, and analysis began as the information was examined for implications related to the research questions. At this point, the construction of the questionnaire began.

Phase 2: Quantitative/Questionnaire

The quantitative phase of the research involved the delivery of a questionnaire derived from information generated by the program planners in the focus-group session to the educational consumers of a continuing education institution of a school board in Edmonton, Alberta.

This section outlines the advantages and disadvantages of this questionnaire as an instrument of research and delineates the questionnaire creation, construction, and content. Piloting and field testing are overviewed, and information is provided on the population and sample involved in the research. Assumptions inherent in this part of the research and ethical

procedures utilized are elucidated. The validity and reliability of this research tool are addressed. Finally, the methodology involved in delivery of the questionnaire to and collection from the educational consumers is outlined.

The questionnaire as instrumentation. There were many advantages inherent in the use of this questionnaire for data gathering:

1. It was an efficient method of data collection, inexpensive, and less time consuming than conducting interviews or further focus-group sessions.

2. The administration of the questionnaire to established classes at the delivering institution assured a high rate of return.

3. Specific responses to specific aspects of the marketing mix were requested, and therefore overly subjective interpretations of the processes involved in making buying decisions were avoided.

4. The forced ranking scale copied from the focus-group session provided a clear look at the preferences of the educational consumer and a more accurate comparison of these responses to those of the program planners. In addition, two open options were provided in this section to allow for further educational consumer input.

5. A short-answer section provided participants with an opportunity to deliver, in their own words, additional information which otherwise might have been missed.

There were also possible disadvantages involved in the delivery of this questionnaire. One possible disadvantage of all questionnaires being administered in a classroom situation is that respondents who read slowly or suffered test anxiety might have hurried through the tool in order to finish with the others in the class. Another possible disadvantage of this questionnaire is that the forced rankings might in some cases have been truly forced, with

respondents unsure of their actual rankings but still completing the question as requested.

Creation, construction, and content of the questionnaire. The content of the questionnaire was derived from the information generated in the focus group and formed around the four Ps of the marketing mix of product, price, place, and promotion. Careful analysis of all information collected began immediately following the session and was completed in April 1996. Construction of the questionnaire was completed in May 1996.

Information was reduced and examined for implications related to the research questions. Terms were further defined and elucidated with the educational consumer in mind. Instructions for each section and question were created and revised.

An overarching concern in the creation of this questionnaire was the importance of creating a short questionnaire that could be completed in 10-12 minutes. Classes at this institution were often brief and skill laden, so a special effort had to be made regarding time constraints during class time.

The researcher decided that the questionnaire should be divided into four sections that incorporated the original nine questions in the following way.

Section I consisted of one question only, which corresponded to question 9 in the focus-group activity. It was a simple one asking the participants to "Please check all those criteria that you feel *persuaded you* to choose this course at Continuing Education Services, rather than a similar course at another educational institution." The 10 choices available were drawn from the information collected in question 9 of the focus-group activity. In the researcher's original draft, this section was Section III; but upon the suggestion of a committee member, it was moved to become Section I. Thus,

the questionnaire started with an easier question, and it was hoped that this would encourage the participants to continue.

Section II consisted of four questions and employed a forced-ranking scale. This section originally was Section I, but because the ranking task was more difficult than the rest of the questionnaire, it was considered more appropriate to place it towards the beginning, but not as the start of the questionnaire. Instructions in this section were extremely important, and it was necessary to provide a visual of the rankings in order of importance, clear and explicit instructions, and an example; and to repeat the instructions at the start of each page (2 and 3) housing these questions.

Choices were derived from the final classification and ranking of the four Ps of the marketing mix as provided by the program planners at the end of the focus-group activities. Information for this final ranking was provided in the original questions 1-4 in the focus-group schedule. The choices as listed in the questionnaire were those provided by the program planners, but some choices were reworded slightly to provide a clearer, less institutionally focused meaning.

Section III corresponded to questions 5 and 6 in the focus-group session. In this section participants were asked to provide, in their own words, what they thought the most and the least successful marketing strategy would be in attracting them to the general-interest courses that they were attending. This section was strategically placed so that the participants would be exposed to the four Ps of the marketing mix as presented in the preceding questions. An explanation was also provided in the instructions that a marketing strategy could include features or components of the product, price, place, and promotion in any combination.

Section IV asked the participants to provide demographics by checking their gender (male/female) and age group (under 20, 21-35, 36-49, 50-64, and 65+). This section corresponded to questions 7 and 8 in the focus-group session. The age groupings were derived from this session as well.

The following provides a clear overview of the interrelationship of the focus-group questions and their final placement on the questionnaire.

Focus Group Question	Questionnaire Section/Question
#9	Section I
#1-#4 and final analysis	Section II, 1-4
#5 & #6	Section III, 1 and 2
#7 & #8	Section IV, 1 and 2

Throughout the creation of the questionnaire, the thesis advisor and the two committee members provided input. Six drafts were created. Changes were made to the placement of questions, the clearness of instructions, and a further delineation of terms. An example and a visual of the ranking scale were added.

Piloting and field testing. The purpose of the piloting and field testing was to identify possible problems with the terminology, the clearness of the instructions, and the time frame for completion.

A pilot draft was completed and piloted with staff members at the continuing education institution. The questionnaire appeared to be easy to understand and took from 8 to 12 minutes to complete. Because no problems were encountered with this internal group, it was decided that the pilot draft could be field-tested.

Because the class instructors had been chosen to distribute the questionnaires at the beginning of the class, then collect and return them to the researcher, it was essential for the researcher to provide both written and

verbal instructions to the instructors. An explanatory letter was created for the course instructor that outlined the procedures and stressed the fact that they must inform their classes that participation was completely voluntary. A copy of this letter can be found in Appendix K.

Each instructor was further notified verbally over the phone of the date and time at which the questionnaires were to be distributed and of the procedure involved in returning the questionnaires to the researcher. Again, the necessity of the instructor's providing a verbal announcement of the voluntary nature of the educational consumer's participation was reiterated. To make the task easier for the instructor and to assure that all the ethical considerations were outlined, a further information page was created for the class participants and attached to the front of the questionnaire.

The field test commenced with the distribution of the pilot draft of the questionnaire (see Appendix L) to four classes at the continuing education institution on June 5, 1996. These four classes were in the content areas of business, computer, wholistic practices, and massage.

In total, 40 questionnaires were dispersed, and 37 were returned. Of these, 18 were completed in full, and 19 were only partially completed or incorrectly completed in one or more sections. The forced-ranking section was the major problem, with some participants using each number more than once and some using only one number—sometimes 1 and sometimes 5!

At this point the researcher considered presenting these questions in a Likert-scale format. After careful consideration, however, the researcher concluded that forced ranking was essential because this part of the questionnaire was driven by the same type of forced rankings used by the program planners.

The pilot draft of the questionnaire was therefore carefully revamped. The word *rating* was changed to *ranking*. The explanation of how to complete the ranking section was more clearly worded. A visual scale (5 to 1) was added. Finally, the information was repeated in a brief format where necessary.

This revised questionnaire (see Appendix M) was field-tested on June 6, 1996, with one business class and one massage class. Thirty questionnaires were delivered and 27 returned, of which 25 were complete and 2 were incomplete. It was decided to use this questionnaire for the data gathering in the quantitative section of the research.

Population and sample. The population from which the sample was drawn consisted of all educational consumers who had purchased and were attending a general-interest course at the continuing education institution in Edmonton, Alberta, during the Spring Session (April-June) of 1996.

The sample consisted of all educational consumers who had purchased and were attending a general-interest course from this continuing education institution in Edmonton, Alberta, from June 7 to June 15, 1996.

The educational consumers in these classes were adult learners participating in a broad content spectrum of continuing education general-interest classes.

A complete listing of the courses included in the study appears in Appendix N. This list also includes the date on which the class was held, the general content area of the class, and the number of questionnaires distributed and returned.

The questionnaires were distributed to a total of 44 classes. Delivery was accomplished through the usual twice-a-week courier system utilized by the institution for the distribution of course materials. Three of the courses were

cancelled due to lack of enrolment, which meant that 41 classes were involved in the study.

To assure the smooth distribution and return of the research instrument and to provide a comprehensive overview of the research field, the researcher compiled a grid. This grid included the following information: course name; date, time, and location of class; length of course and number of classes (from first night to last night); type of course; instructor name and phone number; number of questionnaires distributed (based on registration); and number of questionnaires returned.

Assumptions. The data-gathering activities were based upon the following assumptions. It was assumed that the sample was representative of the educational-consumer population of a public continuing education institution in Edmonton, Alberta, during Spring 1996; it was assumed that the respondents answered truthfully; and it was assumed that the instructors distributed the questionnaires as requested.

Data gathering. In an effort to achieve a standardized method of presentation, the questionnaire was administered *before* the commencement of each class by the instructor, who followed the script provided. The participants were informed verbally by the instructor that participation was not mandatory and that if they commenced to complete the questionnaire and wished to stop during the time allotted for questionnaire completion, they could do so during this time frame.

The purpose and nature of the research were explained on the attached sheet, which informed the participants that to ensure anonymity, they were not to place their names on any part of the questionnaire. They were also informed that there was no coding procedure involved and that the researcher had no need to know the identity of individual participants. The information would

remain confidential. Only the researcher and the university staff involved in the data analysis would have access to the data, which would be kept in the researcher's home until final acceptance of the thesis. A copy of this letter is found in Appendix M.

The participants were informed that they were subjects who were at minimal risk because the information sought was not of a personal nature, but rather a perception of why they had made this purchasing decision.

Finally, information on the possible availability of the research results was disclosed.

The questionnaires were distributed and collected by the instructors and returned to the researcher.

Ethics. The research proposal and a description of the project and procedures for observing ethical guidelines were presented to the Ethics Review Committee of the Department of Educational Policy Studies at the University of Alberta for its approval.

Included in both this proposal and the description of the project and procedures were the ethical guidelines that were incorporated into the research procedures.

Separate ethical procedures were provided for the two groups of participants in the research, the program planners and the educational consumers. The specific ethical procedures were implemented and followed for both of these groups have been provided in this chapter.

Validity. Content and face validity of the questions incorporated into the questionnaire were established before the focus-group session. This information was delineated on p. 31. Content validity was determined by marketing and registration personnel within the institution who had knowledge of the content of the marketing mix and of which factors contributed to

persuading learners to buy this type of education. Face validity was established by the researcher, who felt that the questionnaire would measure what it should, based within the parameters of the four Ps of the marketing mix, and that the sample of educational consumers was adequate to be representative of how such a population would respond to the marketing mix.

Reliability. This questionnaire was designed to measure perceptions of educational consumers. No such tool was found in the literature or in the field of practice. Therefore, any insights that the researcher could gain about the questionnaire measuring consistently over time would be enhanced only by further research in this field by this or other researchers using the same questionnaire.

The treatment of the returned questionnaires. A total of 317 questionnaires were returned either fully (289) or partially (28) completed. Upon return, these questionnaires were coded for three locations (North, South, and Central) and four generic program area (business, computers, massage and wholistic practices, and creative and home arts) on the top right-hand side of the first page.

The locations and program areas were not originally included in the research questions. This researcher found, however, that research is a dynamic process in which questions or the desire for clarifiers not previously considered arises. It was surmised that additional information of interest to the researcher, both in work- and research-related areas, might be garnered by subjecting the data to this analysis, so the additional coding was added.

The researcher met with an advisor at the Centre for Research and Applied Measurement and Evaluation (CRAME) and a staff member in the Faculty of Education (Department of Educational Policy Studies) for assistance with an

overview of the coding and data-input procedures involved in the statistical analysis of a questionnaire.

Following the advice received, the questionnaire was coded for data input purposes as follows. The numbers 1 to 52 were assigned as code numbers to the components of the questionnaire, as revealed in Table 1; and variables within these components were given a number as well.

Table 1

Questionnaire Coding

Code	Components of questionnaire
#1	Questionnaire identification number: #1-#318
#2	Course type: 1 = business 2 = computers 3 = massage/wholistic 4 = creative/home arts
#3	Location: 1 = North 2 = Central 3 = South
#4-#13	Section I: 1 = no check mark 2 = check mark
#14-#50	Section II, Questions 1-4: This section was input according to the forced-ranking scale and utilized the numbers 5, 4, 3, 2, and 1, where 5 was *most important* and 1 was *least important*. If no answer was provided, the number 0 was assigned.
#51	Section IV, Question 1: 1 = male 2 = female
#52	Section IV, Question 2: 1 = under 20 2 = 21-35 3 = 36-49 4 = 50-64 5 = 65+

The data from the questionnaires were then input into a computer at CRAME utilizing the Statistical Program for the Social Sciences (SPSS). Section III (free-response data) was subjected to clustering by the researcher based on the components of the four Ps of the marketing mix as revealed in the literature.

The resulting data in Sections I, II, and IV were analyzed statistically for both descriptive statistics and analysis of variation between means. Analysis of variance was conducted for:

(1) Gender (2 - Male, Female)

(2) Age Groups (5 - Under 20, 20-35, 36-49, 50-64, 65 +)

(3) Program Areas (4 - Business, Computers, Massage/Wholistic, Creative and Home Arts)

(4) Locations (3 - South, Central, North)

Summary

The methodology employed for this research was a between-methods, two-phase design. Phase 1 was qualitative and utilized a focus group of program planners to generate information for the construction of a quantitative questionnaire. This tool was then delivered in Phase 2 to a sample of educational consumers at a continuing education unit of a public school board.

Information obtained from both phases was then analyzed to seek elucidation of the research questions concerning the similarities and differences in the perceptions of program planners and educational consumers as to what really works in the marketing of general-interest programs in continuing education. This analysis is presented in Chapter 4.

CHAPTER 4

RESULTS OF THE STUDY

This chapter unfolds the results of the study as they occurred progressively during the research process. First, the results of the information generated by the program planners in the focus-group session are revealed. Then the results from the tabulation of the questionnaires completed by the educational consumers are provided. A brief summary leads to the concluding chapter of the thesis.

The Focus-Group Results, From Whence Came the Questionnaire

Of interest to the researcher was the fact that although this session was designed to be qualitative, a number of quantitative information was also generated. This information proved useful not only in the creation of the questionnaire, but also in the final comparative analysis as revealed in Chapter 5.

The information generated by the focus group of program planners is now presented in full. Each of the nine questions is reiterated and treated on an individual basis. To reveal more accurately the restructuring of questions 1-4 as a unit, these questions are also presented in an overview format at the beginning and the end of this presentation.

Responses generated are revealed as they appeared on flip charts, stickies, and cards. Juxtaposed with these responses are some verbal comments of the program planners as recorded by the researcher during the session. The results are summarized at the end of this section.

Questions 1-4

An overview of the responses generated for questions 1-4 is provided prior to the presentation of these four questions. Two tables are presented below which reveal these four questions with the color of the stickie utilized, the number of responses generated, and the number of categories into which the program planners clustered their responses. Table 2 reveals the original clustering as performed by the program planners upon the completion of the response-generation session in the morning.

Table 2

Original Clustering of Responses: Questions 1-4

Question no.	Color	Responses	Categories
1. Program	Red	70	16
2. Price	Green	39	17
3. Place	Purple	56	16
4. Promotion	Pink	63	22
TOTALS		228	71

After the intensive insular nature of the original response generation for the first four questions and the performance of the above perfunctory clustering, the program planners felt that they needed time to discuss and adjust the placement of the responses and the classification of the clusters.

This led to open discussions on some of the responses; for example, on how the price of the product was related to perceptions of program quality. Also, a further delineation of the program planners' understanding of target marketing was reviewed. Following this discussion a rejuvenated approach towards how the responses were categorized on the flip charts commenced.

Some stickies were moved to different flip charts. Categories were reorganized and restructured. The results of this work are revealed in Table 3.

Table 3

Final Clustering of Responses: Questions 1-4

Question no.	Responses	Categories
1. Program	68	10
2. Price	42	5
3. Place	55	5
4. Promotion	63	11
TOTALS	228	31

Comparison of these two tables reveals that although the number of responses was identical, there was some movement of responses between questions, and the number of categories dropped dramatically from 71 to 31. Verbal comments from the program planners revealed that they were now thinking in more global clusters as the four Ps of marketing became increasingly clear in their minds.

Responses generated in the focus group from these four questions are now revealed as flowing from the 31 clusters, as shown in Table 3. Each question is reiterated and followed by the number of categories and responses, as revealed in Table 3. Tables 4-7 reveal the categories created, the number of responses generated, and the actual responses flowing from the program planners' work during the focus-group session.

Question 1

When marketing your programs, what do you think is most important to communicate to your educational consumers about the program itself? Table 4 includes 10 categories containing 68 responses.

Table 4

Categories and Responses from Question 1: Product

Category	Response no.	Responses
1. Benefits	11	Benefits to consumer (3),* individual needs, personal benefits, worthwhile, career value, innovative, enrichment, enhancement, value
2. Social	5	Meet new people (2), fun, enjoyable, relaxing
3. Certification	5	Certificate outcome (3), value of full-time programs (2)
4. Instructor	11	Who the instructor is, quality and expertise (4), excellent (2), qualified, credentials, unbiased information on instructors, top notch
5. Skills	7	Develop and expand on skills (3), gain new skills (2), try out new skills with minimal time and money costs, learn a lifelong skill
6. Content	20	Exciting and all- inclusive course descriptions (6), applicability to the workplace (2), current, new, wide range of offerings, quality, value, culturally attuned, educational, curriculum based, remedial, type of session (e.g., workshop) described, how program compares to offerings at other institutions, no. duplicating internal or external programs
7. Administration	2	Good reputation for an institution around for a long time, convenience and speed of registration system
8. Target audience	3	Age specific, appealing to one or more target groups, responds to different client needs
9. Location	2	Where course held, different locations
10. Ratio	2	Let consumers know the ratio of teacher to students

* The numbers shown in brackets indicate the number of times that the response was generated.

Question 2

When marketing your programs, what do you think is most important to communicate to your educational consumers about the price? Table 5 includes five categories containing 42 responses.

Table 5

Categories and Responses from Question 2: Price

Category	Response no.	Responses
1. Competition	5	Competitive (3),* comparable (2)
2. Overhead	4	Cost-recovery basis (3), rent paid to schools (1)
3. Discounts	2	Reduced prices and how to access (2)
4. Payment options	7	Funding/bursaries (3), method of payment (2), payment plans for full-time programs, when payment due
5. Value/benefits	24	Value for money (7), what is included (4), reasonably priced (4), affordable (2), price per hour (2), price vs. quality of instructor, consider target group ability to pay, length of program, tax deductible, refund policy

* The numbers shown in brackets indicate the number of times that the response was generated.

Question 3

When marketing your programs, what do you think is most important to communicate to your consumers about the place where your programs are delivered? Table 6 includes five categories containing 55 responses.

Table 6

Categories and Responses from Question 3: Place

Category	Response no.	Responses
1. Convenience	22	In your neighborhood (6),* accurate directions provided (5), easy to find (2), on bus routes (2), variety of locations (2), accessible (2), south side, north side, must they cross the river or drive on a freeway
2. Parking	4	Availability (4)
3. Safety	2	Safe location
4. Suitability	15	Suitable facility for program or class (8), good facility (2), adult tables/chairs (2), atmosphere, equipment in good working order, only place in Edmonton for this type of course
5. Service	12	Other locations than schools re availability of days and times (4), facilities open well in advance of class starts (3), well-trained site hosts (2), directions to classroom, directions re amenities, supplies ready before class

* The numbers shown in brackets indicate the number of times that the response was generated.

Question 4

When marketing your programs, what do you think are the most effective types of promotional activities? Table 7 includes 11 categories containing 63 responses.

Table 7

Categories and Responses from Question 4: Promotion

Category	Response no.	Responses
1. Internal	4	Superintendent's memo/bulletin (2),* internal mailbag, school newsletters
2. Target marketing	8	Target specific group (4), mailing lists to established customers (2), generic marketing followed by targeted fliers, target specific courses
3. Calendar	4	Main calendar delivered at consistent intervals
4. Print promotion	17	Other than main calendar: fliers and brochures specific to individual programs (3), newsletters (2), free promotion in newspapers (2), billboards, newspaper ads, ad features, ads in specific papers (e.g., *Commerce News*), highlight instructors, note what's hot in papers, tell about happy customers, tell about the fun in print, timely production of fliers, well-written copy
5. Electronic promo	5	Radio (2), T.V. (2), home page (Internet)
6. Where/who	9	Agencies and groups (3), libraries/suppliers/ communities (2), geographic areas where clientele located, co-operative programs
7. Current clients	5	Promote next level by phone (2), reminders, contact wait lists promptly, promote at competitors' location if they offer a similar program
8. How to	3	Be daring and innovative, utilize strategies practised by the arts, utilize systematic follow-up with clients and agencies
9. Personal contact	4	Word of mouth re quality (customer), network and become your own publicist (planner), recall previous clients (registration staff), personal contact (all staff)
10. Customer gain	2	Benefit oriented, provide samples of classes
11. Instructors	2	Instructor as promotional agent (2)

* The numbers shown in brackets indicate the number of times that the response was generated.

The responses to these four questions were revisited at the end of the focus-group session, and their final recategorization provided the impetus and content for the creation of Section II of the questionnaire. The results from this final restructuring are revealed following the results from questions 5-9, which are presented below.

Question 5

What marketing strategy do you feel is the most successful in attracting educational consumers to your courses? For this question, a total of 14 5" x 8" cards were filled with 51 responses. Three pairs of program planners presented their strategies in pairs, and one pair presented their own thoughts on an individual basis.

The results are revealed here as generated by each of the four pairs of program planners; they are reported in a paragraphic format by the researcher. These same results are also clustered around the four Ps of the marketing mix to create Table 8.

Table 8

Categories and Responses From Question 5: Most Successful Strategies

Category	Response no.	Responses
1. Product	13	Relevant, appealing, timely, useful, progressively developmental, needed, wanted, knowledge, skills, interesting information, quality, ease of registration, benefits highlighted
2. Price	1	Cost featured
3. Place	5	Location, user friendliness, easy access, "only place in town," credibility of institution

(table continues)

Category	Response no.	Responses
4. Promotion	32	Market to target groups with target brochures (6),* market to general public, class calendar, quality of class calendar content and writing (9), flyers (4), T.V. (2), radio, community papers, home page (Internet), computer networks (Elder Net), highlight benefits, call-backs to customers, newspaper ads, develop close relationship with media for promotion (2), print media, personal contact, utilize instructors for promotion, utilize customers for promotion (2)

* The numbers shown in brackets indicate the number of times that the response was generated.

The first pair presented an overall strategic marketing plan in which they suggested that the institution develop a program that was relevant, appealing, timely, useful, progressively developmental, needed, and wanted. This, they said, would result in a package of knowledge, skills, and interesting information. This package should be marketed to target groups and the general public through the main calendar, flyers, T.V. promotion, and call-backs to customers. It is essential then that the registration process be both easy and convenient.

The second pair concentrated on the promotional aspect of marketing. They felt that the overall media strategy should include newspaper ads (location and timing are important), television, radio, community papers, home page (Internet) and computer networks (e.g., Elder Net). It was suggested that a compatible and close relationship be developed with media providers for promotional purposes. The main calendar should be more concise and always current and timely. Subject-specific brochures should be developed, and the language should be enticing, vibrant, daring, and direct. It was suggested that training in copy writing should be ongoing for program planners.

The third pair focused on print media, benefit copy, and personal contact. The main brochure should be well produced and widely distributed and should include photos and features. This brochure, although a mainstay, should be combined with program- or course-specific flyers targeted to specific groups and previous customers. Instructors and previous customers should be utilized for radio, T.V., and personal contacts. A major focus of all marketing should be the benefits of taking courses through this institution. Cost, location, current and unbiased information, user friendliness and easy access, "the only place in town" for some programs, and the credibility of the institution should be featured in promotional efforts.

The final pair provided their information separately. One individual said that it was essential to mail flyers to target audiences. The other said that the quality of the program speaks volumes in terms of promotion. Returning "customers" are our biggest source of advertising, and they watch for the calendar.

These responses are presented in Table 8 in a clustered format based on the four Ps of the marketing mix. When considering these results, it was obvious to the researcher that even though the program planners had been steeped in the four Ps of the marketing mix in this focus group, when they were faced with a question on marketing, their immediate instinct was to home in on the promotional aspects of the mix.

This focus-group question (#5) was utilized as question 1 in Section II of the questionnaire for educational consumers.

Question 6

What marketing strategy do you feel is the least successful in attracting educational consumers to your courses? Seventeen responses were generated in one category only, that of promotion. It was interesting for the researcher to note that, although this question was driven by the term *marketing strategy,* the responses were focused only on the promotional aspect of marketing. These responses are presented in Table 9.

Table 9

Categories and Responses from Question 6: Least Successful Strategies

Category	Response no.	Responses
1. Promotion	17	Trade shows and promotional booths (2),* limited distribution of the class calendar (2), billboards (2), mailing lists which are outdated (2), generic newspaper ads (2), supplements, marketing personnel who do not have marketing knowledge, sign-up lists in classroom, postcards, poor course descriptors, registration information at back of calendar, articles and features in calendar.

* The numbers shown in brackets indicate the number of times that the response was generated.

Question 6 in the focus group was presented as question 2 in Section II of the questionnaire.

Question 7

Do you think different marketing strategies should be employed for different age groups? Two flip charts with 10 items each, for a total of 20 responses, were generated by two groups of four program planners.

This question elicited a major discussion on the age categories that the researcher had provided and an eventual restructuring of these age categories by the program planners. The age categories established by the program planners as more accurate and applicable to their own continuing education institution were teens (under 20); young adults (20-35); adults (36-49); older adults (50-64), and seniors (65+).

The following factors were considered important in the marketing of courses to different age groups. They are presented in the order in which they appeared on the flip chart, which was not in any order of perceived importance.

Flip Chart 1

1. Price (teens, kids, seniors)
2. Value (best bang for the buck)
3. Timing (day vs. evening; weather, snowbirds, time of year, work hours, school hours)
4. Life experiences and course content
5. Peer-group participation (teens, young adults)
6. Location and accessibility
7. Teaching style and methodology
8. Print media: age appropriate;(e.g., size, vocabulary, abstract vs. concrete)
9. Length of course, class
10. Do not stereotype your age group

Flip Chart 2

1. Time of day
2. Day of week
3. Price

4. Disposable income
5. Location
6. Topic
7. Life stages
8. Size of print
9. Course description
10. Physical quality and attributes of the facility

These responses were then clustered by the researcher into the four distinct categories based on the model of the four Ps of the marketing mix. The following clusters emerged as revealed in Table 10. It appears from the responses to this question that once the program planners focused on different age groups, their thoughts on the marketing mix were more directed to the content of the course (product) than to the other aspects of the marketing mix.

To bring closure to the focus-group work on this question—"Do you think different marketing strategies should be employed for different age groups?"—the program planners were asked to vote yes or no. They were unanimous in answering "Yes."

Table 10

Categories and Responses from Question 7: Age Categories

Category	Response no.	Responses
1. Product	11	Topic, life stages (from course content perspective) (2),* length of course, time of day (2), day of week (2), season of year, peer-group participation, teaching style/methodology
2. Price	2	Price (2), perceived value for income and time invested, disposable income available
3. Place	3	Physical attributes of location, accessibility, location

(table continues)

Category	Response no.	Responses
4. Promotion	4	Size of print, age-appropriate vocabulary, age-appropriate course descriptions, do not stereotype age group in descriptions

* The numbers shown in brackets indicate the number of times that the response was generated.

The age categories as identified by the program planners were then incorporated into the demographic portion (Section IV) of the questionnaire as question 2.

Question 8

Do you think different marketing strategies should be employed for each gender group? Although this question was also presented as one requiring a yes-or-no answer, it elicited a great deal of discussion. Program planners knew—and it was reiterated by the focus-group facilitator—that the educational consumer base at their institution was weighted approximately 3:1 in favor of the female gender. They were also aware that other continuing education institutions experienced a similar ratio of females to males.

The question of gender was incorporated in the focus-group portion of this research to attempt to explore whether program planners had any intuitive or cognitive understanding of why significantly more female than male educational consumers participated in continuing education. Flowing from this understanding, it was hoped that the factors revealed might be utilized within the implementation of the marketing mix to aid in attracting more male educational consumers.

Exploration of the question led to discussion focused around individual program-content areas. For example, could it be that the content of some of the program offerings favored a female consumer? This led to the issue of

stereotyping: Should stereotypes be reinforced, or should an attempt be made on the part of the institution to break through them? These individual responses were recorded by the researcher and are presented verbatim:

> Is this not true in that all Continuing Education there is now and has always been a preponderance of females? Maybe its just the way it will always be.
>
> Maybe the need for females to participate in continuing education is higher at this point in history, as women are reentering the workforce in enormous numbers.
>
> Is there a chilly atmosphere at this institution for men as all of the programmers here are women?

Discussion on the gender issue therefore took on a more philosophical than market-oriented focus.

Although the two groups each created a flip chart, the responses generated on the flip charts were sparse.

Flip Chart 1

1. The issue should be seen in shades of gray, not black and white.
2. Most strategies should be inclusive of both genders, with some exceptions.
3. When marketing programs, the institution should avoid stereotyping, gender bias, assumptions, and human-rights violations.
4. Possibilities of program options should be kept open.
5. There should exist possibilities to explore particular concerns of gender; for example, menopause.

Flip Chart 2

1. Should consider promotion of nontraditional topics for males or females. Examples: automotives for women, parenting for men, active living for both sexes in nontraditional sports.

Responses generated from this question, which fit into the marketing mix, are presented below in Table 11.

Table 11

Categories and Responses from Question 8: Gender

Category	Response no.	Responses
1. Product	3	Try non-traditional topics for each gender, program for some gender-specific concerns, keep program options open
2. Promotion	5	Avoid stereotyping (2),* avoid gender bias, avoid human-rights violations, avoid assumptions

* The numbers shown in brackets indicate the number of times that the response was generated.

When the question of different marketing strategies for each gender group was put to a vote, the result was inconclusive. One program planner said "Yes," two said "No" (but both added the codicil "in a perfect world"), and the final five remained firmly planted on the fence, saying that "Yes and no" was their answer.

This question was incorporated into the questionnaire in the demographics section (Section IV) as question 1.

Question 9

What do you think attracts educational consumers to the general-interest programs in this institution instead of another continuing education institution or private competitor? This question was well placed after the idea generation and intense discussions of the day. The four pairs of program planners generated a total of 39 responses on the four flip charts created for presentation to the group. The responses were presented in order of perceived importance and are revealed below.

Flip Chart 1

1. Accessibility (in your neighborhood)
2. Special equipment (computer, cooking, floral labs)
3. Quality of instructors
4. Reputation of instructors
5. Price
6. Vast number of course selections
7. Length of courses and programs
8. Satisfaction of consumer requests
9. Customizing courses and programs
10. Recognized marketing; i.e., in course calendar

Flip Chart 2

1. In your neighborhood
2. Parking availability
3. Quality of programs
4. Vast variety of programs
5. Being part of a public school board adds credibility.

6. Former history or association with the institution
7. Wide distribution of course calendar

Flip Chart 3

1. Low-key, nonthreatening atmosphere
2. Comfort zone of locations
3. Volkswagen vs. Cadillac
4. Diversity of course topics, levels, and approaches
5. Flexibility in curriculum
6. Always good reputation
7. No pressure of exams
8. Reasonable cost
9. Certificates in shorter time, less cost
10. Nearby locations
11. Referrals from friends
12. Course calendar delivered to door
13. Managers of programs easily accessible to answer questions
14. Good registration system

Flip Chart 4

1. Accessibility—in your neighborhood
2. Nonthreatening, nonacademic, friendly atmosphere
3. Part of a school system of long-standing reputation and credibility
4. Blanket distribution of course calendar
5. Variety of offerings
6. Habit—course junkies

7. Good experience—repeat customers
8. *Some* prices undercut competition.

Responses from these four flip charts were clustered by the researcher in order of the perceived importance attached to them by the program planners. *Perceived importance* was defined by both the number of times an item or like item was mentioned and the original position of that item in the chart.

After this clustering was completed, a total of 10 factors were revealed as attracting consumers. These 10, in order of perceived importance, are presented in Table 12, along with the responses generated.

Table 12

Factors Attracting Educational Consumers to This Institution

Factor	Responses
1. Location	In your neighborhood, accessible, nearby, special equipment available, parking available
2. Instructors	Quality, reputation
3. Atmosphere	Friendly, relaxed, comfortable, low key, non-threatening, non-academic, no exams
4. Price	Reasonable, some prices undercut competition's, certificates can be attained at lesser cost
5. Administration	Program managers easily accessible, good registration system
6. Promotion	Wide distribution of course calendar to consumers' homes and beyond; well-recognized marketing tools in the marketplace
7. Content	Wide variety of topics, levels, and approaches; good and varied length of courses and programs; certificates in shorter time at less cost; flexibility in course design and delivery; satisfaction of consumer requests for content
8. Atmospherics	Association with a public school board of long-standing reputation and credibility has enhanced credibility of continuing education offerings; history of the continuing education unit itself well established in the community

(table continues)

Factor	Responses
9. Reputation	For quality programs and courses has produced repeat customers and attracts new ones; good experience produces repeat customers and referrals to friends and co-workers; satisfaction of consumer requests for courses and additional levels of the programs
10. Extension of offerings	Customized courses and programs for organizations available upon request

The first nine of these factors were incorporated in the questionnaire as choices in Section I. Factor 10 was not, because the educational consumers surveyed were participating in regular course offerings, not in customized courses. A 10th choice in the questionnaire, *Ease of registration,* was added by the researcher.

Questions 1-4 Revisited

At the end of the day, the first four questions surrounding the four Ps of the marketing mix were revisited. The objective of this process was to provide for the researcher both a final clustering of responses to be used as choices in the questionnaire and a forced ranking for these clusters, which could then be used to compare with data generated by the educational consumers.

Tables 13-16 identify, by each of the four Ps, the final clusters and their rankings by the program planners. Clusters included in the questionnaire as choices are starred, and any additional choices that the researcher felt to be important, but that were not identified by the program planners, are added at the end of each list of clusters.

Table 13

Final Clustering and Ranking of Question 1: Product

Clusters	Ranking
* Content	32
* Skills	25
* Self-fulfillment	22
* Instructor	15
* Social	7
* Certification	6
* Teacher-student ratio	6
* Reputation	5
* Location	2

*Clusters included in the questionnaire as choices Additional items added by researcher in the questionnaire were time of day, day of week.

Table 14

Final Clustering and Ranking of Question 2: Price

Clusters	Ranking
* Value for $	40
* Price vs. competition's	26
* Price vs. overhead	25
* Other benefits (value added)	14
* Payment options	8
* Discounts	7

*Clusters included in the questionnaire as choices

Table 15

Final Clustering and Ranking of Question 3: Place

Clusters	Ranking
* Convenience	31
* Stability	31
* Service oriented	23
* Parking	21
* Safety	14

*Clusters included in the questionnaire as choices

Table 16

Final Clustering and Ranking of Question 4: Promotion

Clusters	Ranking
** Class calendar	35
* Target marketing	34
** Mass marketing	15
* Print promo	14
* Electronic (T.V./radio)	12
* Personal contact	6
* Networking	3
Internal communication	1
Showcase benefits	0

* Clusters included in the questionnaire as choices

** Program planners felt that class calendar and mass marketing could be combined, which would mean an overwhelming number-one choice in their opinion as to what really promoted the continuing education courses.
One additional choice was added by the researcher to the questionnaire: news articles in the paper.

Summary of the Results of Section I

The responses generated by the program planners in the focus group formed the basis for the content and structure of the questionnaire delivered to the educational consumer. The questionnaire results are revealed below.

Section II: The Questionnaire Results: The Educational Consumers Respond

The questionnaire development and treatment were reported in Chapter 3. What follows are the results and the analysis of the results of the questionnaires completed by the educational consumers who participated in the study. First the sample is described as a whole, and then an analysis of each section of the questionnaire is provided.

The Sample Described as a Whole

The following section describes the sample of educational consumers as revealed in the 318 returned and useable questionnaires. The sample surveyed was extremely representative of the classes offered at this institution during the Spring session.

This sample closely approximated the gender percentages revealed in the annual *Scantron* results provided by the institution. Recent reports indicated that 76% of the educational consumers attending general-interest classes at this institution were female, and 24% were male (Continuing Education Services, 1996). The sample from this research revealed that 78.5% (n = 249) were female and 21.5% (n = 68) male.

The division of this sample into the five age groups chosen by the program planners resulted in statistics that are not directly comparable to those of the

institution. Figure 1 shows the percentage of participants by age group as revealed in the study.

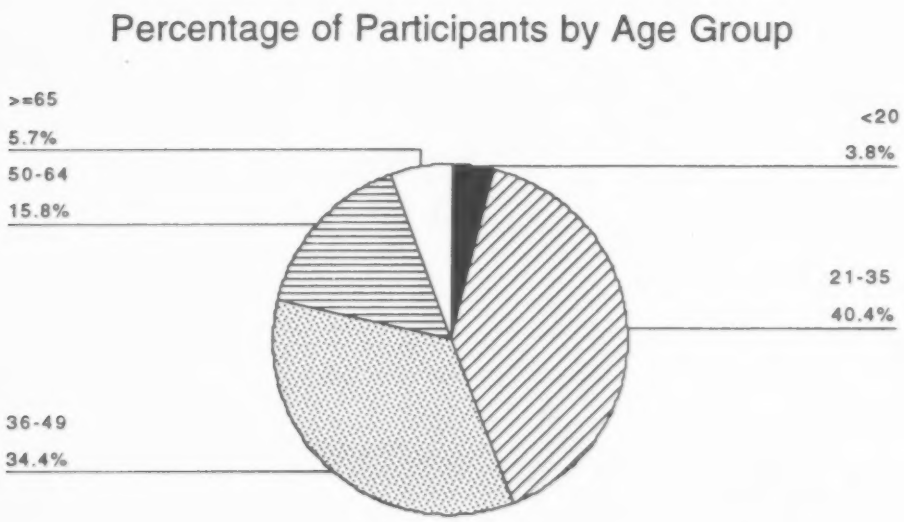

Figure 1. Percentage of participants by age group.

A rough comparison to the institution's statistics can be made if the age groups are further combined, as revealed in Table 17.

Table 17

Rough Comparison of Age Groups: Sample and Institution

Age group	Sample percentage	Institution percentage
Under 20-35	44.2	38.7
36-49	34.4	42.8
50+	21.5	18.5

The course types were roughly divided into four program areas: business, computers, massage/wholistic, and creative/home arts. Of the 41 courses, 8 were in the subject area of massage and wholistic, 8 in computers, 14 in

creative and home arts, and 11 in business. This approximates the usual weighting of the distribution of course types at the institution.

Courses surveyed included those that covered the broad range of offerings for which the institution is known. Business and computer courses were balanced by courses in massage, wholistic therapies, floral arts, proofreading, photography, careers, first aid, music, oil painting, dancing, language training, law, gardening, creative writing, new age, workplace training, secretarial arts, speed reading, and visual display. A full listing of these courses is found in Appendix N. Figure 2 provides a visual representation of the percentage of participants by program area.

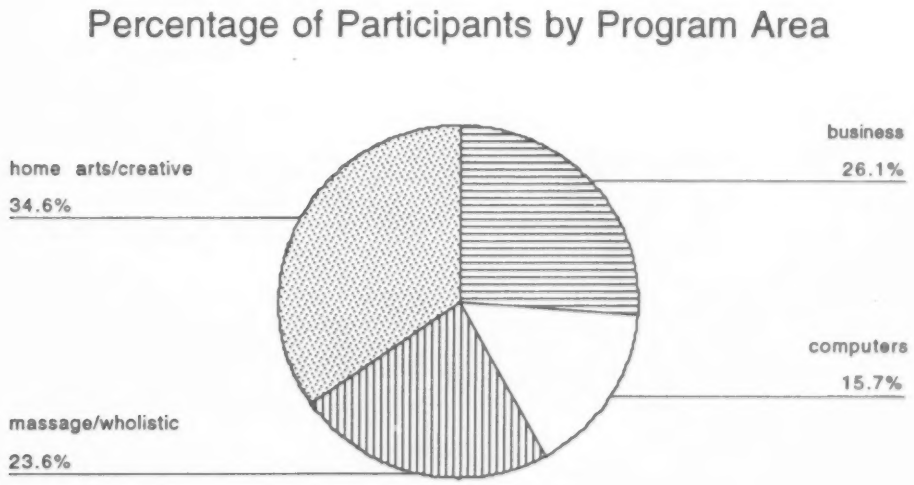

Figure 2. Percentage of participants by program area.

Course locations included 12 of the more popular locations within the system, of which 8 were schools, 3 were locations operated by the institution, and 1 was a location external to the school system. Central locations (4) were those in the downtown area: the new facility (CES Downtown), Victoria

School, the Society for the Retired and Semi-Retired, and the old administration building. North locations were defined as those north of the river, but not in the downtown location: Sherbrooke, Westmount, and Ross Sheppard. South locations were those south of the river: Harry Ainlay, W. P. Wagner, Windsor Park, Hardisty, and Bonnie Doon.

Figure 3 shows the percentage of participants according to location.

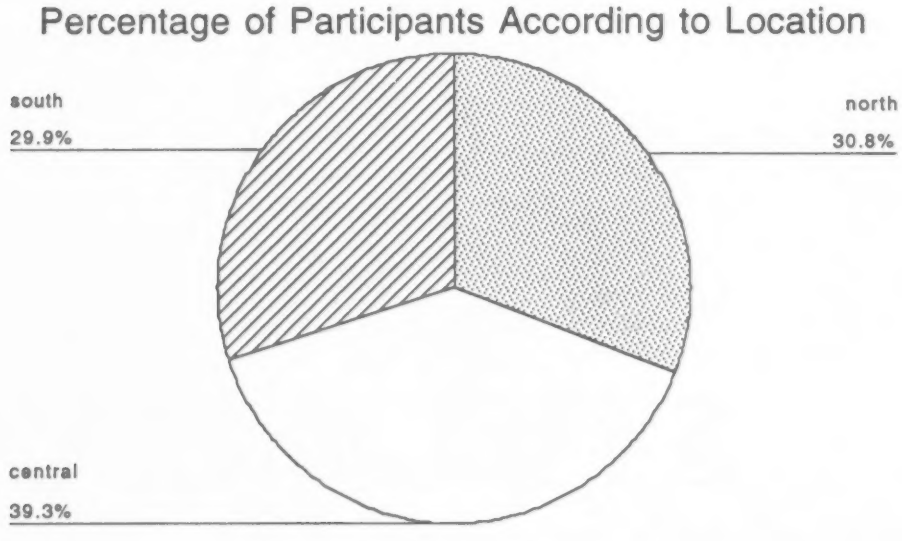

Figure 3. Percentage of participants by location.

In summary, the sample as a whole can be described as representative of the overall population of this institution. Of the respondents, 78.5% were female and 21.5% male. Nearly 75% of all the respondents were in the age range of 21-49. The largest program area represented was creative and home arts (approximately one third of the sample). The other areas, in decreasing order of size in this sample, were business courses, massage and wholistic, and computers. Courses were delivered in three locations by area, with the central

location being the most popular (40%). Figures 4 and 5 further describe this sample.

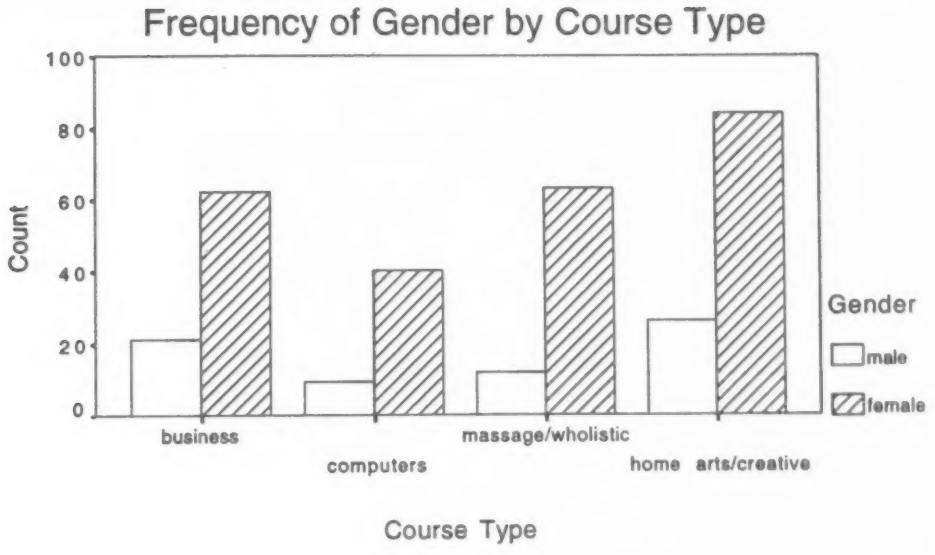

Figure 4. Frequency of gender by course type.

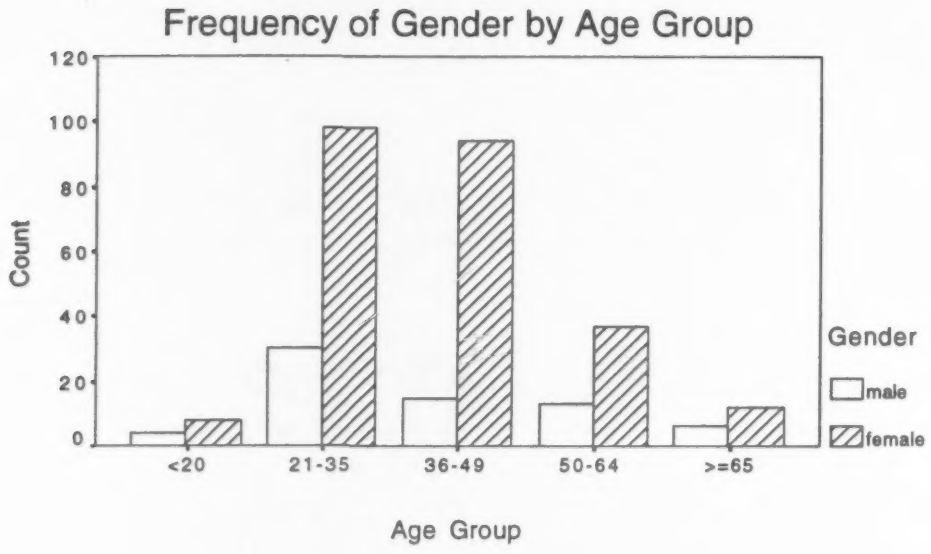

Figure 5. Frequency of gender by age group.

Section I Results

In Section I of the questionnaire, educational consumers were asked the following question: **"Please check all those criteria that you feel *persuaded you* to choose this course at Continuing Education Services, rather than a similar course at another educational institution."** Ten responses (#4-#13) were possible, and these responses were subjected to (a) frequency and percentage analysis of responses, and (b) cross tabulation by gender and age group of responses. Table 18 provides the response choices and a frequency and percentage analysis of the choices that were checked in the entire sample.

Table 18

Frequency and Valid Percentage Analysis of Checked Responses to Section I

Choice	Frequency	Valid percentage
Content of course	210	66.2
Reasonable price	198	62.5
Accessible location	172	54.5
Ease of registration	150	47.3
Quality instructor	124	39.1
Reputation of CEd Services	111	35.0
Only offered at CEd Services	82	25.9
Comfortable atmosphere	73	23.0
Promotion	29	9.1
Associated with school board	26	8.2

These data reveal that the five most important criteria that persuaded these educational consumers to choose a particular course at this institution, rather than a similar course elsewhere, were (in descending order) content, reasonable price, accessible location, ease of registration, and quality instructor.

Checked responses from Section I were then cross tabulated using the variables of gender and age groups using a Chi-square test of significance. The results of this procedure, where a significance level of .05 or less was found, are as follows.

Gender. The only significant difference found in the responses to these choices when cross tabulated for gender was the response to the choice of "Reputation of Continuing Education." Of males, 51.5% (35/68) considered the reputation of the institution to be a persuading factor in choosing a course at this institution, compared to 30.6% (76/172) of females. The Chi-square analysis revealed a significant difference level of .0014 (Pearson) and .00173 (likelihood ratio).

Age group. Cross tabulation by age group revealed a significant difference in two of the choices: comfortable atmosphere and ease of registration. These choices are presented below in Tables 19 and 20, which reveal the percentage of responses by age groups. The relevant statistical significance information follows.

Table 19

Percentage of Responses to "Comfortable Atmosphere" by Age Group

Age group	Percentage of responses
< 20	16.7
21-35	26.0
36-49	16.5
50-64	22.0
65 +	50.0

The Chi-square analysis resulted in a significant difference level of .03980 (Pearson) and .03238 (likelihood ratio) when comparing the over-65 age group with all other age groups. A comfortable atmosphere seems to be more importance to the over-65 age group than all other age groups.

The Chi-square analysis resulted in a significant difference level of .03980 (Pearson) and .03238 (likelihood ratio) when comparing the under 20 age group with all other age groups. Ease of registration therefore seems to be quite important to all age groups except the under 20.

Table 20

Percentage of Responses by Age Group to Ease of Registration

Age group	Percentage of responses
<20	16.7
21-35	49.6
36-49	41.3
50-64	58.0
65+	61.1

No cross tabulation was performed for these choices for course type and location. However, the percentage of yes responses by course type and location were tabulated and are presented in Tables 21 and 22, followed by the researcher's comments.

Table 21

Percentage of Yes Responses by Course Type for Each Choice

	Course type			
Choice	Business	Computers	Massage/ wholistic	Creative/ home
Accessible location	39.0	58	61.3	59.6
Comfortable atmosphere	19.3	24	13.3	32.1
Reasonable price	57.8	64	61.3	66.1
Quality instructor	21.7	32	48.0	49.5
Reputation of CES	28.9	36	41.3	34.9
Ease of registration	36.1	64	42.7	51.4
Promotion	10.8	10	6.7	9.2
Only offered at CES	34.9	12	29.3	22.9
Content of course	63.9	68	69.3	65.1
Associated with school board	8.4	16	6.7	5.5

It seems that location is not as important for educational consumers taking business courses when compared to all other course types and that a comfortable atmosphere is less important to those enrolled in massage and wholistic courses.

Perhaps the most interesting result of these statistics is the difference between the course types for the choice "Only at Continuing Education Services." Only 12% of educational consumers in the computer course area checked this choice, compared to a range of 23%-25% in the other course areas. This might indicate that there is a greater choice of computer courses in the educational marketplace in which CES is located.

Table 22

Percentage of Yes Responses by Location for Each Choice

	Location		
Choice	North	Central	South
Accessible location	62.2	47.6	55.3
Comfortable atmosphere	23.5	19.2	27.7
Reasonable price	66.3	62.4	58.5
Quality instructor	50.0	29.6	40.4
Reputation of CES	39.8	36.0	28.7
Ease of registration	44.9	44.0	54.3
Promotion	13.3	8.8	5.3
Only offered at CES	24.5	24.8	28.7
Content of course	66.3	68.0	63.8
Associated with school board	8.2	12.0	3.2

It seems from these percentage statistics that accessible location and quality instructors are deemed more important by those educational consumers taking courses in the North locations.

Section II Results

In Section II of the questionnaire, educational consumers were asked to rank their responses in each of four questions that were based on the four Ps of the marketing mix—price, place, promotion, and product. The choices in this section were numbered from 14 to 50. The respondents were to use the numbers 5, 4, 3, 2, and 1, with *5* being the highest ranking and therefore most important and *1* being the lowest ranking and therefore the least important. Each number was to be used only once, and all other boxes were to be left blank.

There were also two blank boxes for "Other Options," which allowed the participants to provide their own responses to each of these questions. Appendix O provides a summary of participant responses to "Other Options." The participants were successful in identifying other choices that could have been included in the questionnaire, and the most salient of these choices are noted under each table to which they apply.

Means and standard deviations. Tables 23-26 display for the individual questions on price, place, promotion, and product the mean and standard deviation for the valid number of responses to each choice. These tables are presented in descending order of mean importance for easy comparison to the program planners' rank ordering created at the end of the focus-group session.

Table 23

Mean and S.D. for Valid Numbers for Price

Choice	Mean	S.D.	Valid no.
Value for money	4.18	1.29	314
Price vs. competition	2.81	1.64	314
Other benefits/value	2.17	1.58	314
Payment options	1.96	1.49	313
No tax dollars support	1.52	1.46	314
Discounts	1.08	1.33	314

Other options: income-tax deductible, employer paid, cancellation policy.

Table 24

Mean and S.D. for Valid Numbers for Place

Choice	Mean	S.D.	Valid no.
Convenience	4.21	1.38	312
Suitability	2.92	1.33	312
Parking	2.80	1.25	312
Safety	2.23	1.38	311
School staff	2.00	1.38	312

Other options: familiar place/school, public-transportation route.

Table 25

Mean and S.D. for Valid Numbers for Promotion

Choice	Mean	S.D.	Valid no.
Class calendar	4.08	1.50	314
Word of mouth	2.52	1.59	314
Target marketing	2.44	1.65	314
Personal contact	1.79	1.68	314
News articles	1.61	1.39	314
T.V./radio	.85	1.25	314
Newspaper ads	.62	1.26	314

Other options: "Instructor told me," information from previous course.

Table 26

Mean and S.D. for Valid Numbers for Product

Choice	Mean	S.D.	Valid no.
Build skills	3.17	1.71	316
Current/timely	2.51	1.99	316
Self-fulfillment	2.14	1.86	316
Time of day	1.64	1.62	316
Day of week	1.61	1.73	316
Certificates	1.06	1.71	316
Instructor reputation	.91	1.57	316
Accessible location	.60	1.19	316
Reputation of CES	.55	1.20	316
Teacher-student ratio	.41	1.01	316
Socializing	.31	.86	316

Other options: only one offering of course, length of course, further my education.

T-tests. Following the generation of these descriptive statistics, the data from Section II were then subjected to t-tests for independent samples of each response by the variable of gender. Levene's Test for Equality of Variances was performed.

Significant differences between the genders were found in the following data items, as revealed in Table 27. In the *price* category of marketing, discounts were more important to males than females, and the fact that no tax dollars support the course was more important to females than males. In the *promotion* category, T.V. and radio were more likely to attract females than males. In the *product* category, certificates were more important to females than males, and the opportunity to build skills was more important to males than females.

Table 27

Significant Differences by Gender for Questionnaire Section II

Data item and gender	Number	Mean	P value
No tax dollars support this course	66	1.4240	.038
Male	247	1.5506	
Female			
Discounts			
Male	66	1.3636	.002
Female	247	.9960	
T.V./radio			
Male	66	.7273	.025
Female	247	.8907	
Opportunity to build skills			
Male	67	3.5373	.027
Female	248	3.0806	
Certificates offered			
Male	67	.7612	.048
Female	248	1.1411	

ANOVAs. Finally, the data from Section II were subjected to a oneway analysis of variance (ANOVA) by the three locations, five age groups, and four categories of course types. A Scheffe test with a significance level of .05 was used as a multiple-range test. Tables 28-30 exhibit only the significant variances found in this analysis. The largest mean is noted first, and the *F probability* refers to the variance between the means as listed.

In Table 28 (location) it appears that discounts are more important to those attending courses in the Northern part of the city than they are in the Central part. This could be because at the central locations many courses offered are business and computers, and the course is often paid for by the educational consumer's place of work.

Table 28

Oneway ANOVA by Location

Data item	Location	Mean	F prob.
Discount	North	1.3299	.0236
	Central	.8443	
Parking	South	3.1064	.0164
	Central	2.6281	
Instructor reputation	South	1.2526	.0023
	Central	.5447	
Socializing	South	.4947	.0290
	Central	.1870	

Parking, it seems, is a more important issue in the locations south of the river than in central locations. This result came as a surprise. One of the concerns raised about the central locations by CES administrative staff was the fact that CES customers would have to pay for parking, something that they had never had to do at school locations. The results from this sample do not reveal a large concern about parking in Central locations, but they do reveal a significantly larger concern for South locations.

A possible reason that those attending classes south of the river rated parking as more important than those attending in central locations did could be the extreme difficulty (at times) of finding a parking spot at Harry Ainlay. Harry Ainlay is a school which receives the heaviest program load from CES, as well as extensive community bookings. Add to this the fact that it is next door to a rink and swimming-pool facility, and finding a parking spot can become almost impossible. One conclusion to be drawn from this result is that the convenience of finding a parking spot is of more importance than the inconvenience of having to pay for one.

Another surprising result to the researcher was that consumers in the South locations rated instructor reputation as more important than did those

from Central locations. South locations in this survey included classes in mainly massage/wholistic and creative and home arts. Central locations in this survey were utilized for mostly business and computer classes. The researcher felt that if there was any difference, it would be that those taking business-oriented classes would be more likely to rate instructor reputation as important to them.

Access to instructor names is limited at this institution because few instructors are listed in the class calendar. This fact was commented upon by several (7) consumers in the questionnaire, all of whom were taking business courses. Upon reflection, perhaps this result means that those participating in business-oriented courses trust the institution to provide quality instructors. Those participating in leisure learning perhaps follow an instructor from course to course or rely more on word of mouth from other participants.

The final significant variance was not a surprise. Socialization was rated very high in importance by those in the South locations and not very high in importance for those in Central locations. Although socialization was often noted in the research literature (Yang, 1995) as a motivation for participation in adult education, it is not often a motivation for participation in business courses. The results revealed in this survey confirm this thinking.

Table 29

Oneway ANOVA by Age Group

Data item	Age group	Mean	F prob.
Payment option	<20	2.4167	.0018
	21-35	2.1440	
	50-64	2.0208	
	36-49	1.8899	
	> = 65	.6667	
Safety	21-35	2.4400	.0633
	36-49	2.0841	
	50-64	1.8571	

The results as exhibited in Table 29 (age group) seem to indicate that payment options are less important to educational consumers over 65. Perhaps this is because those over 65 are used to paying "up front" for what they need.

Also, safety appears to be a more important consideration to the 21-35-year-old group than to those from 36-49 and 50-64. Perhaps this younger group has an awareness of safety factors that the other two groups do not?

Finally, an ANOVA by course type was conducted. Table 30 reveals these results, which seem to suggest the following: Word of mouth is more important as a promotional tool to those registering in creative and home arts than to those registering in business, and instructor reputation is more important to consumers in the massage and wholistic program areas than to consumers in business and computer courses. These two significant differences reflect what was revealed in the results from the ANOVA regarding location when location was analyzed as to course type. Educational consumers in business-oriented courses seem to rely more on institutional reputation (i.e., they assume the courses will provide the quality that they need) and less on information from other students or instructor information.

Table 30

Oneway ANOVA by Course Type

Data item	Course type	Mean	F prob.
Word of mouth	Creative/home arts	2.8991	.0032
	Business	2.1250	
News articles	Massage/wholistic	2.0133	.0041
	Business	1.2625	
Instructor	Massage/wholistic	1.4533	.0005
	Business	.6098	
	Computers	.4200	
Certificates	Business	1.6707	.0000
	Massage	1.5733	
	Computers	.7600	
	Creative/home arts	.3945	
Time of day	Creative/home arts	1.9633	.0219
	Business	1.2805	

News articles were seen to be more important in the massage and wholistic area probably because more news articles have been published about these areas in the past two years. Perhaps, also, business-course consumers rely more on their employers?

Surprisingly, certificates were not rated as important by computer registrants as by those registered in business courses. Perhaps it is strictly the skill that computer consumers are seeking, because there are as many or more certificates offered in the computer area as in the business area.

The time of day that classes are offered was obviously much more important to those in the home and creative arts area than to those in the business program area. Perhaps this is because business programs offer more variety in their time allocations?

Section III Results: The Clustering

Of the 318 returned questionnaires, 259 included all or partial completion of Section III. Fifty-nine consumers chose not to complete these short-answer questions, perhaps because of time restraints or because they wished to finish with the other participants.

Educational-consumer responses in this section were clustered by the researcher based on the components of the four Ps of the marketing mix as revealed in the literature. The two questions in this section are reiterated below, followed by the clustering presented in table format.

Question 1. **In your own words, what marketing strategy do you feel is the most successful in attracting you to these general-interest courses?** A total of 606 responses were generated in short-answer and point-form format. These responses were then clustered by the researcher and are presented in Table 31 according to each of the four Ps of the marketing mix. For general and specific comments generated in Section III by the educational consumers, see Appendix O.

Table 31

Most Successful Marketing Strategy by Educational Consumers

The four Ps	Response no.
Promotion	342
Product	164
Price	67
Place	36

Overall, promotion received the greatest focus (342 responses). The results revealed in Table 31 are an apparent reversal of the results in Table 18 (p. 79). Here, promotion ranked a lowly 9th out of 10 choices for factors

attracting consumers to this institution. However, consumers' perceptions of what they believed to be important may not have been based in fact. It might also be that consumers want to appear rational when responding to a finite list such as that offered in Section I. Also, the word *promotion* might not have been fully understood in this section. It seems that whenever the word *marketing* is used, however, promotion comes to mind, and this could have resulted in the immense focus that promotion received in the open-ended question. In descending order of importance, the educational consumers felt that an overall strategic marketing plan would involve heavy emphasis on, first, promotion, then the product, then price, and finally place.

The responses were clustered again according to the number of times a response was generated. Drawing from this, Table 32 reveals the top 10 effective components of a marketing strategy according to these educational consumers.

Table 32

Top Ten Effective Components of a Marketing Strategy by Educational Consumers

Strategy	Response no.
1. Class calendar as promotional tool	266
2. Content	78
3. Time of day/day of week	30
4. Cost reasonable and affordable	28
5. Word of mouth from a friend/student	23
6. Instructor reputation and quality	20
7. Price competitive	17
8. Accessible location	11
9. Newspaper articles (not ads)	11
10. Wide variety of courses	9

The total number of responses incorporated in this table (493) represents over 80% of the responses generated from this question.

Question 2. **In your own words, what marketing strategy do you feel is the least successful in attracting you to these general-interest courses?** This question was not completed by as many educational consumers as was question 1 in this section, but it still produced 216 responses that were categorized and are revealed in Table 33 according to the four Ps of the marketing mix.

Table 33

Least Successful Marketing Strategy by Educational Consumers

The four Ps	Response no.
Promotion	149
Product	22
Place	28
Price	17

The responses were clustered again according to the number of times that a response was mentioned. Table 34 reveals the least successful marketing strategy according to the educational consumer.

Again, these responses represent over 80% of the total responses generated for this question.

Table 34

Ten Least Effective Marketing Strategies by Educational Consumers

Strategy	Response no.
1. T.V.	45
2. Radio	33
3. Newspaper ads	25
4. Too far from home	18
5. Too pricey	17
6. Hard-sell tactics	13
7. Flyers	9
8. Not knowing what course content is	8
9. Instructor's name not mentioned	5
10. Difficulty finding classroom	5

Summary of the Questionnaire Results

An enormous amount of data was generated when the questionnaire was subjected to analysis. Although the questionnaire was essentially a quantitative tool, the short answers in Section III and extra options in Section II, as well as occasional unsolicited comments written on the questionnaire by the educational consumers, provided extra responses that painted a rich qualitative picture to enhance the data.

Summary

Chapter 4 revealed the results generated in the two phases of the study. But how do the responses revealed from the focus group of program planners compare to the responses enumerated by the educational consumer as revealed in the questionnaire? The research will address this question in Chapter 5.

CHAPTER 5

FINDINGS COMPARED, ANALYSIS, CONCLUSIONS, AND RECOMMENDATIONS

Introduction

This chapter presents the findings from both phases of the research in a comparative format and then draws upon this presentation to discuss and analyze the findings as related to the research questions. The conclusions are elucidated. The chapter closes with recommendations for future research.

Comparing the Findings of the Research

The findings from Chapter 4 are presented as follows. First, the problem statement is reiterated; then salient responses from the program planners in the focus group are compared to similar responses from the educational consumers in the questionnaire. This comparison is driven by the nine questions utilized for response and data generation in both phases of the research.

Statement of the Problem

The problem addressed by this study was to identify the perceptions of program planners and educational consumers as to what constitutes effective marketing for general-interest programs in a public school continuing education unit in Alberta.

Comparing the Nine Questions

To identify the perceptions of the program planners and the educational consumers more accurately, responses and data generated from both phases of the research are now presented and compared on a question-by-question basis.

The nine questions utilized during the focus-group session were also utilized in the questionnaire. Information on the placement of these questions during both phases of the research was revealed in Chapter 3, and a clear overview of the interrelationships of these questions was provided on p. 43.

The order of questions as presented here follows the order in which the questions were presented in the focus-group session. Each question is presented first in the format utilized in the focus group and then in the format utilized in the questionnaire. Following the questions, a side-by-side presentation of program-planner and educational-consumer responses is shown in tables (35-41). The source of the original tables from Chapter 4 is also identified.

Questions 1-4

For questions 1-4, the responses are ranked in descending order from 1, which is considered the most important for these comparison purposes. Blank spaces in the *Program planners* column represent features not utilized in the questionnaire. Items with stars in the *Educational consumers* column represent features identified by the researcher as important, based on the literature and the researcher's practice as a program planner, but not identified during the focus-group session. The term *features* as used in these tables is synonymous with *categories* or *components.* Some features in each column are worded differently but essentially have the same meaning (as indicated by [a, b]). It was necessary to reword some features as identified by the program planners to ensure that the internal institutional understanding of these words could be imparted to the educational consumers. These features are identified in the tables.

Question 1. **"When marketing your programs, what do you think is most important to communicate to your educational consumers about the program itself?"**

"How important were the following features of the course itself (the product) when you decided to register in this course?"

Table 35

Comparison of Rank Order of Responses for Program (Source: Tables 13 & 26)

Program planners		Educational consumers	
Rank	Program features	Rank	Program features
1	Content	1	Build skills
2	Skills	2	Content
3	Self-fulfillment	3	Self-fulfillment
4	Instructor	4	Time of day*
5	Social	5	Day of week*
6	Certification	6	Certificates
7	Teacher-student ratio	7	Instructor reputation
8	Reputation of CES	8	Accessible location
9	Location	9	Reputation of CES
		10	Teacher-student ratio
		11	Socializing

*Features introduced by the researcher that were not identified by the program planners but were identified in the literature.

Question 2. **"When marketing your programs, what do you think is most important to communicate to your educational consumers about the price?"**

"How important were the following features of the price when you decided to register in this course?"

Table 36

Comparison of Rank Order of Responses for Price (Source: Tables 14 & 23)

Program planners		Educational consumers	
Rank	Price feature	Rank	Price feature
1	Value for money	1	Value for the money
2	Price vs. competition's price	2	Price vs. another provider's price
3	Price vs. overhead[a]	3	Other benefits/value
4	Other benefits (value added)	4	Payment options
5	Payment options	5	No tax dollars support this course[a]
6	Discounts	6	Discounts

[a]Same meaning.

Question 3. **"When marketing your programs, what do you think is most important to communicate to your educational consumers about the place where your programs are delivered?"**

"How important were the following features of the place (location) when you decided to register in this course?"

Table 37

Comparison of Rank Order of Responses for Place (Source: Tables 15 & 24)

Program planners		Educational consumers	
Rank	Place features	Rank	Place feature
1	Convenience	1	Convenience
2	Suitability	2	Suitability for adults
3	Service oriented[a]	3	Parking
4	Parking	4	Safety
5	Safety	5	School staff/signs available to give directions[a]

[a]Same meaning.

Question 4. **"When marketing your programs, what do you think are the most effective types of promotional activities?"**

"How important were the following promotional methods in attracting you to register in this course?"

Table 38

Comparison of Rank Order of Responses for Promotion (Source: Tables 16 & 25)

Program planners		Educational consumers	
Rank	Promotion feature	Rank	Promotion feature
1	Class calendar	1	Class calendar
2	Target marketing	2	Word of mouth[a]
3	Print promo[b]	3	Target marketing
4	Electronic (T.V./radio)	4	Personal contact
5	Personal contact	5	News articles*
6	Networking[a]	6	T.V./radio
7	Internal communication	7	Newspaper ads (paid)[b]

[a]Same meaning. [b]Same meaning.
*Features identified by the researcher that were not identified by the program planners but were identified in the literature.
Note: Internal communication was not utilized in the questionnaire.

Questions 5 and 6

Questions 5 and 6 are presented in two ways. For each question, tables from Chapter 4 are presented side by side that show in rank order the volume of responses from each sample in each of the four Ps of the marketing mix. The rank order is 1 to 4, where 1 represents *most responses.* Then a brief report is provided that summarizes the focus of each sample as reported in Chapter 4.

Question 5. **"What marketing strategy do you feel is the most successful in attracting educational consumers to your courses?"**

"In your own words, what marketing strategy do you feel is the most successful in attracting you to these general-interest courses?"

Table 39

Most Successful Strategy: Ranked by Number of Responses (Source: Tables 8 & 31)

Program planners		Educational consumers	
Rank	Most successful strategy	Rank	Most successful strategy
1	Promotion	1	Promotion
2	Product	2	Product
3	Place	3	Price
4	Price	4	Place

Program planners' overall strategy, as identified in Table 8, would be, first, to provide a quality product (timely, relevant, needed, and wanted) that imparted knowledge and skills. This product would be promoted mainly through the class calendar and targeted brochures, as well as print and electronic media. A close relationship should be developed with the media and instructors and former students utilized for promotion. The product should be delivered at a user-friendly, easily accessible location.

Educational consumers' overall strategy was presented in Chapter 4 as the Top Ten (Table 32), in which 10 clusters or responses by subject area accounted for over 80% of the responses. These Top Ten, in descending order of importance, were class calendar as a promotional tool, timely and quality course content, flexible time of day and day of week for course delivery, reasonable and affordable cost, hearing about the course from a friend or

another student, quality instructor, competitive price, accessible location, newspaper articles, and wide variety of course offerings.

Question 6. **"What marketing strategy do you feel is the least successful in attracting educational consumers to your courses?"**

"In your own words, what marketing strategy do you feel is the least successful in attracting you to these general-interest courses?"

Table 40

Least Successful Strategy: Ranked by Number of Responses (Source: Tables 9 & 33)

Program planners		Educational consumers	
Rank	Least successful strategy	Rank	Least successful strategy
1	Promotion	1	Promotion
		2	Place
		3	Product
		4	Place

The program planners focused on what they thought were poor promotional strategies. These included poor distribution and organization of the class calendar and promotional items, trade shows, billboards, outdated mailing lists, generic newspaper ads, sign-up lists in classrooms, and lack of institutional marketing expertise.

Educational consumers revealed a more comprehensive approach to marketing as a strategy. Their Top Ten least effective marketing strategies, clustered by strategy (Table 34) and listed in descending order, were T.V. ads, radio ads, newspaper ads, poor location, courses too costly, hard-sell tactics, flyers, not knowing what the course content is, instructor's name not mentioned, and difficulty finding the classroom.

Questions 7 and 8

Questions 7 and 8 were delivered in different formats for the program planners and educational consumers. The results between the two samples in each question were not meant to be directly comparable. Although the program planners provided a yes or no answer to both of these questions, following some discussion and response generation from which they drew their conclusions, the educational consumers were asked only to provide demographic information on age and gender.

Question 7. **"Do you think different marketing strategies should be employed for different age groups?"** was the question answered by the program planners. The educational consumers were asked to provide the demographic information, **"I fit within the following age group."**

The program planners responded to their question with a unanimous eight yes votes. Their thinking seemed to focus on the product as being the factor that generated interest in differing age groups (Table 10).

The results of the ANOVA generated by the cross tabulation of educational consumers in age groups yielded significant differences in two data items from #14-#50. Payment options (product) were less important to educational consumers over 65, and safety (place) was more important to the 21-35-year-old group than to the 36-49- or the 50-64-year-old groups (Table 29).

Other results that involved age groups were those generated from a cross tabulation of data items #4-#13 with age groups. When educational consumers were asked to respond to a list of items that persuaded them to choose the continuing education course they were taking rather than a similar course from another institution, two responses revealed a significant difference. "Comfortable atmosphere" (Table 19) was more important to those over 65,

and "Ease of registration" (Table 20) was less important to those under 20 than to all other age categories.

Question 8. **"Do you think different marketing strategies should be employed for each gender group?"** was the question answered by the program planners. The educational consumers were asked to provide their gender.

The program planners' thinking centered around two issues, as revealed in Table 11. The product (or courses) might, they felt, benefit from some gender-specific and some nontraditional programming for each gender, but options should be kept open. Promotion for such courses must at all costs avoid stereotyping and gender bias. The vote on the question produced mixed results: one yes, two nos, and five firm "maybes."

Gender data from the questionnaires was subjected to two types of analysis. A t-test for independent samples revealed significant differences for five data items in items #14-#50. Discounts (price) and the opportunity to build skills (product) were found to be significantly more important to males than to females. Of significantly more importance to females were the items "No tax dollars support this course" (price), "T.V./radio" (promotion), and "Certificates offered" (product).

Data items #4-#13 were cross tabulated and revealed significant differences by gender only in the educational consumer response to "Reputation of Continuing Education." Males considered the institution's reputation to be more important (51.5%) in choosing the course than did females (30.6%).

Question 9

"What do you think attracts educational consumers to the general-interest programs in this institution instead of another continuing education institution or a private competitor?"

"Please check all those criteria that you feel *persuaded you* to choose this course at Continuing Education Services, rather than a similar course at another educational institution."

Table 41 provides a comparison between the responses of the program planners, as ranked by the researcher following the focus group session, and those of the educational consumers, as ranked statistically by frequency and percentage analysis of their choices.

Table 41

Comparison of Factors Attracting Educational Consumers to Continuing Education Services (Source: Tables 12 & 18)

Program planners		Educational consumers	
Rank	Factors	Rank	Factors
1	Location	1	Content
2	Instructors	2	Reasonable price
3	Atmosphere	3	Accessible location
4	Price	4	Ease of registration
5	Administration	5	Quality instructor
6	Promotion	6	Reputation of CES
7	Content	7	Only offered at CES
8	Atmospherics	8	Comfortable atmosphere
9	Reputation of CES	9	Promotion
10	Ease of registration	10	Associated with school

Educational-consumer data were also subjected to cross tabulation by gender and age groups, as discussed under questions 7 and 8 above.

These comparative findings are now further explored in the discussion and analysis which follow.

Discussion and Analysis of the Findings: The Research Questions

In this section each of the four research questions is now revisited and discussed. Discussion flows from the comparative responses and data displayed in this chapter, the research literature, and the researcher's own knowledge and reflections.

The first two questions are now displayed and discussed within the parameters of the four Ps of the marketing mix, the most and least successful strategies, and why these educational consumers chose a course at Continuing Education Services.

Research Question 1

"What similarities exist between the perceptions of the general-interest program planners and the educational consumers as to what is effective in marketing?"

Price

Program planners and educational consumers both considered value for the money and a competitive price as first and second in importance, respectively, and discounts as the least important. This finding strongly supports the opinions expressed in the literature and is also a reflection of the current competitive market in which this institution is located. Discounts are probably perceived as least important because they are not yet a major factor within the strategic marketing plan of the institution.

Place

Convenience and suitability were considered the top two priorities for the location of the course by these two groups. Again, there has been support for these results in the literature. Also, the institution is known for its wide variety of locations conveniently located in many neighborhoods.

Product

Only self-fulfillment (3) and certificates (6) were given the same priority by these two groups.

Promotion

Both groups perceived the class calendar to be the most important factor in promoting the continuing education courses. This calendar is a sophisticated and well-developed marketing tool widely distributed to the consumer base. It is the heart of the promotional plan. As such, this result was expected.

Marketing Strategy: Most and Least Successful

Promotion through the class calendar and the course content were identified as the most important by both the groups for the most successful strategy.

The least successful strategy for these groups involved what were perceived to be poor promotional tactics. Of interest to the researcher were each group's differing defining parameters of what "poor promotional tactics" involved. These are revealed in the same subsection of the next question.

Why Choose Continuing Education Services?

As revealed in Table 41, there were no actual similarities in the order of the perceptions of these two groups as to how important the factors identified by the program planners were to the educational consumers in attracting them to the general-interest courses at the institution. This result was a surprise to the researcher and is further discussed under this heading in the next question.

Research Question 2

"What differences exist between the perceptions of the general-interest program planners and the educational consumers as to what is effective in marketing?"

Price

Price versus overhead or the fact that no tax dollars supported the courses offered at this institution was considered to be number 3 in importance to program planners, but only number 5 to the educational consumer. Program planners felt that the consumers might be more comfortable with the price of courses if they realized that they alone bore the total cost. Educational consumers did not rate this as an important factor in their decision-making process.

Place

Service orientation of the location was rated higher by the program planners (3) and last by the educational consumers (5). Some consumers commented that they were not aware of the services afforded them at the course site. Service provision did in fact vary with location. Program planners,

on the other hand, knew that even if the service is behind the scenes, it is essential to location quality.

Product

Many differences were found. The major one was the fact that the program planners did not generate any responses that focused on time of day and day of week as an important feature of the product. Based on the literature, these two data items were added to the questionnaire, where they were rated 4th and 5th in importance by the educational consumer out of 11 data items.

Educational consumers rated building skills as their top choice and content as their second choice. These two were reversed by the program planners.

Instructor reputation and quality were rated higher by program planners than by educational consumers; and the socializing factor, rated 5th by program planners, received the lowest rating (11) by the educational consumers. Socialization as a motivation for participation is obviously not embraced by these consumers.

The teacher-student ratio was rated higher in importance by the program planners (7) than by the educational consumers (10).

Promotion

Target marketing was perceived to be more important by the program planners (2) than by the educational consumers (3), and "word of mouth" was thought to be more important by the consumers (20) than by the planners (6). Of interest was the educational consumers' regard for the effectiveness of T.V./radio and newspaper ads, which they listed last (#6 and #7), compared to the program planners' rankings (#3 and #4).

These results suggest that advertising in print and electronic media should be examined for actual effectiveness. They also seem to suggest that networking, whether by students or staff, is extremely effective for educational consumers in attracting them to general-interest courses.

Marketing Strategy: Most and Least Successful

Differences were exhibited in the responses of both groups to these questions. The questions were open-ended and allowed for data generation based on knowledge and understanding of marketing from the perceptions of those involved in marketing the product and those involved in purchasing the product. Of interest to the researcher was the fact that program planners concentrated for the most part on the promotional aspects, whereas educational consumers painted a broader picture of the marketing mix.

The most successful strategies as identified by the educational consumers included items that were not considered by the program planners in their response to this question. Flexible time of day and day of week, reasonable and affordable cost, and quality instructor were three factors identified by this group as part of a successful marketing strategy.

The least successful strategies for program planners concentrated on internal procedures such as mailing lists, sign-up lists in classrooms, lack of marketing expertise in the institution, trade shows, and poor distribution of the class calendar. Educational consumers, on the other hand, identified what had not worked for them in the past: T.V., radio, newspaper ads, poor location, costly courses, not knowing what the course content was, difficulty finding the classroom, and no mention of the instructor's name in the calendar.

Why Choose Continuing Education Services?

There were vast differences exhibited in the perceptions of program planners and educational consumers as to why educational consumers had chosen the continuing education institution. The first three choices as identified by the program planners were location, instructors, and a comfortable atmosphere. The educational consumers identified content, reasonable price, and accessible location as the most important. Ease of registration was not identified by the program planners as being important, yet it ranked number 4 with the educational consumers. The reputation of Continuing Education Services was perceived by the program planners as less important (9) than the educational consumers' responses (6) would indicate.

Research Question 3

"Is the response of the educational consumer affected by gender?"

The answer to this question is a qualified yes—qualified because only 6 out of a possible 47 data items revealed a significant difference in gender responses. Responses from the male educational consumers indicated that discounts, building skills, and the reputation of the continuing education institution were more important to them than they were to the females. Responses from female educational consumers indicated that T.V. and radio ads were perceived to be more effective for them as a promotional tool. Also, the females rated certificates and the fact that no tax dollars supported the course as more important than the males in the sample did.

Research Question 4

"Is the response of the educational consumer affected by age differences?"

Again, the answer to this question is a qualified yes. The responses of the different age groups yielded significant differences in 4 data items out of a possible 47. Educational consumers over 65 rated payment options (price) less important and responded more positively to the choice of comfortable atmosphere (location) than all other age groups did. Safety (place) was rated significantly more important for the 21-35-year-olds than for the 36-64-year-old groups, and ease of registration (product) was less important to those under 20 than to all other age groups.

Conclusions

This study identified perceptions of program planners and educational consumers as to what constitutes effective marketing for general-interest programs in a public school continuing education unit in Alberta. Many similarities and differences between these two groups were found; and within the educational-consumer sample, some gender and age group differences were identified. A discussion follows that reviews and comments on these similarities and differences, draws some conclusions about the findings, and revisits briefly the limitations of this study.

In the dynamic and ever-changing marketplace facing continuing education institutions today in Alberta, an institutional expertise in marketing is, in the researcher's opinion, essential for such institutions to survive and thrive. In order to gain this expertise, an understanding of the needs and wants of the consumer of the institution's products should be foremost in the thrust of the institution's marketing strategy.

Those closest to the consumer are often the program planners who create the product, set the price, and choose the location. Such planners are often in contact with the consumers by phone or in person to explain the course content. The promotional part of the marketing mix, however, is often removed from this group. Program planners in the institution studied create benefit copy and some target pieces, but their input into higher order marketing strategies is often beyond the scope and time limitations of their work.

Upon reflection, this fact was evident to the researcher in the different focus of both groups to the two open-ended questions on what each group considered the most and least effective marketing strategies. These questions were the only ones in the questionnaire not driven by the information generated in the focus group and therefore allowed for thinking uncluttered by such parameters.

As noted above, the program planners' responses to what does not work in marketing centered on internal promotional procedures over which they seemed to have no control. The realities of their workplace seemed to impinge on their perception of this question. The educational consumers in turn identified what did not work for them not only in promotion (T.V., radio, newspaper ads) but also in place (poor location, difficulty finding classroom), price (high costs), and product (not knowing course content or instructor viability).

The responses by both groups to what they considered the most successful strategies also varied quite widely. Program planners again concentrated on promotional aspects, whereas educational consumers brought forth information on the importance of program flexibility (time of day and day of week) and quality, as well as important price points (reasonable and affordable cost).

When the marketing mix was broken into the four components of product, price, place, and promotion, the responses of both groups were more aligned. A clear snapshot of a good marketing mix for general-interest courses emerges as one composed of the following components: The program is content laden and will either build skills or provide self-fulfillment, the price is competitive and offers good value for the money, the place is convenient and suitable for adult students and delivery of course content, and the product is promoted in the class calendar, which is conveniently available on a wide-ranging and consistent basis. This picture closely approximates what was revealed in the literature.

However, when the mix is "mixed," when the components of the marketing mix identified by the program planners as those persuading the educational consumers to purchase a course at this institution are presented to these consumers, the picture is not as clear. The program planners perceived, in order of importance, that location (in your neighborhood), instructors, atmosphere, price, and ease of registration were their top five picks. The educational consumers told us that their top five choices, in order of importance, were content, reasonable price, accessible location, ease of registration, and quality instructor. Of interest to the researcher was the fact that the program planners perceived the reputation of their institution to be less impacting on the consumer than the consumer data revealed.

It must be acknowledged, however, that a limitation of this study is that the educational-consumer data were gathered from a sample of the existing educational consumers of the institution. Therefore, other institutions' customers and potential customers who never attend general-interest courses were not included. These consumers may have responded differently to the questionnaire and provided a richer information base. Also, the program planners concentrated on their knowledge of existing customers. Therefore,

it would be hard to extend any of the findings or conclusions of this study beyond the parameters of the institution involved.

Further, although useful information was produced about the perceptions of planners and consumers, the assumption was not put forth, or tested, that consumers are more knowledgeable than planners about marketing.

It can be concluded from the analysis of these findings that similarities and differences exist between the program planners' knowledge and expertise in what works in marketing their programs and the educational consumers' understanding of what attracts them to these programs. This information can be utilized, within the limitations noted, to align more carefully the institutional marketing mix with the needs and wants of its consumer.

What follows are recommendations for this alignment, a critique of the research process employed in the study, and recommendations for future research.

Recommendations for Marketing and Future Research

Based on the results of this study, for this institution and for these educational consumers, the researcher would recommend the following for the marketing mix of the institution.

Marketing Recommendations Flowing From This Research

1. Product flexibility should be a key factor in programming. Courses offered at different times of the day and days of the week should receive focus as of prime importance, not only in the programming, but also active promotion of courses offered in more than one format.

2. Skill building should be emphasized in course descriptors and socializing not emphasized in an obvious way.

3. Instructors' names should be included in promotional materials to increase the validity of the product.

4. Reasonable and affordable cost should be emphasized.

5. The use of media (T.V., radio) and newspaper advertisements should be carefully examined for effectiveness.

6. The fact that the institution is a cost-recovery unit is not necessary to emphasize, nor are the service amenities of the location.

7. When marketing to older adults, a comfortable location is especially important.

8. When marketing to males, discounts, skill building, and the reputation of the institution are important factors to incorporate in the courses and course descriptors.

Research Design Recommendations Flowing From This Research

The between-methods, two-phase design approach employed in this research had both positive and negative ramifications. As noted in the literature (Creswell, 1994), this design allowed the first method to inform the second method and added scope and breadth to the study. The researcher was also able to experience the process of both qualitative and quantitative research. Because these processes were entirely different, scope and breadth were added to the researcher's skills and knowledge.

However, both processes were also extremely diverse, and because of this diversity, it was difficult for the researcher to immerse herself in either research technique.

Upon reflection, the response generation from the focus group surrounding the four Ps of the marketing mix might have been more productive (more choices could have been included) and less time consuming (faster completion

by the consumer) if it had been based on a Likert scale rather than on a forced ranking.

Difficulty was also encountered when comparing results from the two groups. Because an N of 8 cannot be compared statistically to an N of over 300, most of the results from this study are not statistically significant.

Recommendations for Future Research

This area of research is virtually untapped on a global scale. Although many institutions conduct their own internal and external surveys of their educational consumers, little research has been done in the new era of cost-recovery institutions on how to assess accurately the consumers' needs and wants within the marketing mix of product, price, place, and promotion.

Replication of this study as designed is not recommended because of the difficulties with the forced ranking and the inability to compare results from both groups in a statistically significant way. Upon reflection, in order to extend this research and remove the limitations, the researcher would recommend the following kinds of studies for future research in this field.

Recommendation #1

Conduct a qualitative study with an equal number of program planners and educational consumers. Institutions could identify those educational consumers who consistently register in a number of courses each year. These "super" consumers could be invited to participate in in-depth interviews based on the four Ps of the marketing mix. Program planners would also participate in a similar process. Results would be compared in a cluster analysis based on the marketing mix.

Recommendation #2

Conduct a quantitative study with educational consumers only, utilizing the questionnaire with forced-ranking sections revised to a Likert scale format. This would be an easier task for participants and would allow for the inclusion of more data items, as identified in the literature.

Recommendation #3

Conduct a study with a broader audience; for example, the sample could include current and past educational consumers as well as nonconsumers of the institutional offerings and nonconsumers of general-interest courses.

Final Summary

This study identified similarities and differences in the perceptions of program planners and educational consumers as to what constitutes effective marketing for general-interest programs in a public school continuing education unit in Alberta. Flowing from the results of the study, recommendations were made by the researcher for marketing in this milieu and further research.

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Appendix A

Letter to the Continuing Education Institution Outlining the Study

February 8, 1996

Mr. Gary Reynolds
Director, Continuing Education Services
Edmonton Public Schools
10820 - 101 St.
Edmonton, AB. T5H 3Z8

Dear Mr. Reynolds:

What really works in marketing your general-interest courses? Interested in finding out more?

This letter is an introduction to a proposed study designed to focus on research in this realm. As a graduate student in the Faculty of Education, I am seeking the approval of your institution to participate in this research.

Specifically, the purpose of this study will be to identify the perceptions of program planners and educational consumers as to what constitutes effective marketing for general-interest programs in continuing education. Research questions which provide direction for this study focus on identifying similarities and differences in these perceptions, as well as the effect of gender and age differences on the buying patterns of your educational consumers.

The research is planned in a "two-phase between methods design" (Creswell, 1994). Phase 1 (qualitative) will be a facilitated focus-group session and will require a full day of participating program planners' time. From this session a questionnaire will be developed for the second phase (quantitative) and delivered by the researcher to 25 randomly selected general-interest classes in the Spring session.

The research proposal has been approved by the Ethics Review Committee of the Department of Educational Policy Studies at the University of Alberta. Participation of program planners and educational consumers will be voluntary, and all procedures necessary for observing ethical guidelines will be followed. A full description of ethical procedures is available for your perusal. Individual results of the study will be kept strictly confidential and all documents generated will be destroyed after the research is completed. The final results, in thesis form, will be made available to your institution.

I know you will be interested in hearing more. I will contact you in person on Monday, February 12 to more fully explain the research and procedures involved.

If you have any questions contact me at 434-4514. I look forward to the participation of Continuing Education Services in this research.

Sincerely,

Sandra Jewell

Appendix B

Letter from the Continuing Education Institution Providing Institutional Approval for Involvement of the Institution in the Study

February 12, 1996

Ms. Sandra Jewell
6407 - 126 Street
Edmonton, Alberta
T6H 3W6

Dear Ms. Jewell:

Re: Approval of Research Proposal

Your research proposal looks good. Continuing Education Services is most interested in providing you with what you require for the proposed study.

You have defined the parameters well; and we understand the participation level you require from our Program Managers and educational consumers.

This letter will serve as formal acceptance of Continuing Education Services' participation in this study.

Thank you.

Yours truly,
Continuing Edcuation Services
EDMONTON PUBLIC SCHOOLS

Gary Reynolds
Director

Appendix C

Letter to Program Planners Requesting Their Participation,

Plus Two-Page Summary

February 15, 1996

Dear Program Planner:

Finding the answer to what really works in marketing general-interest courses is a constant quest for the program planner in continuing education. This letter will serve as an introduction to a research study designed to further this quest, and to ask for your participation in the research process!

Attached is a two page summary of the proposed research for your perusal. The research will be conducted by Sandra Jewell, a graduate student at the University of Alberta in the Department of Educational Policy Studies. Your educational institution has approved your participation in the study.

How can you help? You, as program planners, can assist with the research by volunteering to participate in a one day (6 hour) facilitated focus-group session to be held early to mid-March from 9 a.m. to 4 p.m on a weekday as yet to be determined. Lunch and refreshments will be provided.

The main objective of this session will be to produce the data necessary to drive the creation of a marketing questionnaire for educational consumers at your institution.

This questionnaire will be delivered by the researcher to a random sample of classes in the general-interest program during the Spring session. Data generated from this part of the research will be analyzed and the results will be utilized for the completion of the thesis.

This thesis is tentatively titled: Marketing Continuing Education: Perceptions of Program Planners and Educational Consumers.

As a program planner participant in this research, you can expect to receive a two page summary of the focus-group activities; the questionnaire designed from focus-group data; and a first look at the thesis upon completion and acceptance. You can also expect to increase your knowledge of marketing procedures!

I look forward to your positive response by February 29, 1996. Please call me at 434-4514 to confirm your participation, or ask for further information.

Yours truly,

Sandra Jewell
/att.

Marketing Continuing Education:

Perceptions of Program Planners and Educational Consumers

Introduction

Gone are the "heady days of ever-increasing enrolments" (Calhoun, 1983, p. 17). As we near the end of the twentieth century, educational institutions are increasingly considering "the application of sophisticated marketing techniques" to attract learners to their programs (Buchanan & Hoy, 1983).

Today in Alberta, continuing education providers are facing escalating competition from the sheer number of private and institutional providers and an increasingly dynamic and aggressive marketplace. The educational consumer or customer is, in this new marketplace, an increasingly wise and demanding purchaser of general-interest courses.

Much of the marketing expertise revealed in the current adult education literature focuses on the how-to or methodology of marketing. There is little evidence of research concerning the comparative effectiveness of various marketing strategies (what really works) and the identity of all the stakeholders who can provide this information (who can tell us what will work).

Two of the stakeholder groups who can provide this information exist in most large continuing education units. They are the program planners, those intricately involved in the creation and delivery of programs; and the educational consumers, those intricately involved in the purchasing of these same programs. Optimal effectiveness of an institution's strategic marketing plan would seem to involve the successful juxtaposition of the perceptions of these two entities.

Marketing

Marketing is both an art and a science of managing exchange relationships while considering both benefits and costs to the learner and the organization (Kotler, 1987).

Marketing is also a methodology, or a planned strategy which includes the four Ps of the marketing mix: product, price, place and promotion.

For the purposes of this study, marketing is defined in the context of continuing education as the planned strategy for the marketing mix of product, price, place and promotion, by which the institution can attract educational consumers to its programs.

Statement of the Problem

The problem addressed by this study will be to identify the perceptions of program planners and educational consumers as to what constitutes effective marketing for general-interest programs in a public school continuing education unit in Alberta.

Research Questions

The following research questions will provide direction in pursuing the major problem:

1. What similarities exist between the perceptions of the general-interest program planners and educational consumers as to what is effective in marketing?

2. What differences exist between the perceptions of the general-interest program planners and the educational consumers as to what is effective in marketing?

3. Is the response of the educational consumer affected by gender?

4. Is the response of the educational consumer affected by age differences?

Methodology

The research design for this study will utilize both qualitative and quantitative methodologies, combined in a two-phase between methods design approach.

Phase 1 (qualitative) will employ a focus group of program planners who will provide input during a full day (6 hour) focus-group session and generate data for the creation of a questionnaire. A facilitator hired by the researcher will conduct the session; the researcher will attend the session as an observer. Ethical guidelines for research with human participants will be incorporated into the research procedures.

The questionnaire will be designed, field tested with personnel from the researcher's employing institution, and then revised.

Phase 2 (quantitative) will proceed with the delivery of the questionnaire to a random sample of general-interest classes of educational consumers attending classes in the Spring session. The researcher will provide the verbal instructions to these educational consumers, hand out and collect the questionnaires, and observe all ethical guidelines outlined for research with human participants during this procedure.

Appendix D

Follow-Up Thank You and Confirmation Letter to Program Planners

February 28, 1996

Dear Program Planner:

Thank you for volunteering to participate in the focus-group session for the research project "Marketing Continuing Education: Perceptions of Program Planners and Educational Consumers."

This letter will provide you with information about your rights as a participant in this research project, and details about the session.

ETHICAL GUIDELINES AND YOUR RIGHTS AS A RESEARCH PARTICIPANT

The research you are involved in follows the ethical guidelines for research involving human participants, and has been approved by the Ethics Review Committee of the Department of Educational Policy Studies at the University of Alberta.

1. You have the right to understand the purpose and nature of the research before you provide input at the session.

2. If at any time before or during this session you wish to opt out you may do so.

3. Any information you may provide during the session will remain anonymous and confidential.

4. You are at minimal risk as an individual as group consensus will be sought. Responses will not be identified specifically as originating from one person.

5. You should perceive no threat or harm from your employing institution as the director has given consent to the research and to your participation.

6. Following the focus-group session, the researcher will be the only one with access to the data, which will be kept in the researcher's home safe until the thesis has been accepted. Then the information will be destroyed.

THE FOCUS-GROUP SESSION

The session will take place at McKay Avenue School in the Inspector's Room on March 13, 1996, from 9:00 am to 4:00 pm. Refreshments and a luncheon will be provided.

I look forward to your active involvement.

Yours truly,

Sandra Jewell

Appendix E

Letter to Registration and Marketing Personnel for Research Questions Piloting Procedure

March 5, 1996

Marketing/Registration Personnel

Dear (name):

Attached are 2 pages (33 & 34) of my thesis proposal which must be piloted with two registration and two marketing personnel within continuing education services.

The purpose of the piloting is two-fold:

1. To establish face validity of the questions, in other words, to see if they appear to be valid questions within the realm of marketing, and

2. To establish if the questions are clear and understandable as presented.

As our (director and strategic marketing planner; member of the marketing team; manager of the registration team; member of the registration team) your input would be appreciated and, I am sure, prove valuable.

To assist in the piloting procedure, please read the two pages provided, then re-read and edit questions #1-#9.

As I will be creating the focus-group guide this weekend, I will need your input by Friday, March 8. I know, I know—911 strikes again!

Thank you in advance for you cooperation.

Sincerely,

Sandra Jewell
/att.

Appendix F

Marketing Team Members' Responses to Research Questions Pilot

To: Sandra Jewell

From: Gail Southall

Re: Focus Group Guide Pilot

Thanks for including me in your pilot project. Hope my comments help.

The nine questions of the Focus Group Guide are clear, direct and sound questions, very specific to various key elements of marketing, and presented in a variety of formats which allows for structured direction and creativity and expression of opinion.

Questions 1 - 4 of the Focus Group Guide are very specific to the 4 p's of the marketing mix - which are what marketing really centres itself around. These questions would definitely force the group to examine the products in question from the point of view of the customer.

Questions 4 & 6 of the Guide are good examples of the types of questions used to generate creative, free thinking - another key element in developing a marketing plan. These questions might elicit activities such as brainstroming, mind mapping and concept generating, which facilitate the development of strategies, tactics and objectives for reaching the customer.

Questions 7 & 8 of the guide are demographically based, considering the critical aspect of knowing one's customer in order to determine what specific strategies might be employed to target certain demographic populations.

Question 9 again involves 'thinking like the customer' and includes reference to comparison to the competition, another crucial marketing element.

Summing up, I find the 9 questions to be valid within the realm of marketing, and to cover essential marketing elements. I find them to be clear, concise and well-presented using a variety of questioning techniques.

Gail

Appendix G

Agenda for Pre-Focus Group Session Meeting

AGENDA

Pre-focus group session meeting
March 9, 1996
1 - 4 p.m.
Researcher's home

1. Background to thesis

2. Review of methodology chapter in proposal

* hard copy provided

3. Review of ethical guidelines

* hard copy provided

4. Update on research procedures to date:

* acceptance by Ethical Review Committee

* approach to and acceptance by the institution

* approach to program planners

- initial letter and 2-page summary
- acceptances
- follow-up confirmation letter with ethical guidelines
- time and location of focus-group session

* piloting procedure/results for focus-group questions

Note: hard copies provided

5. Agenda for focus-group session.

* hard copy provided

- discussion on materials and supplies
- discussion on members of focus group

6. Focus-group guide

* review and discussion of questions and procedures

Appendix H

Agenda for Order of Ethical Guidelines in Focus-Group Session

Order of Ethical Guidelines

for

Focus-Group Facilitator

1. Review 2-page summary and ascertain that all participants understand the purpose and nature of the research.

2. Reiterate the right of any participant to opt out of the research during the session.

3. Assure participants that information provided during the session will remain anonymous and confidential.

4. Inform participants that their responses are intended for use in the creation of the quantitative questionnaire and individual responses will not be identified specifically as originating from one person.

5. Inform participants that following the focus-group session, the researcher will be the only one with access to the data; the data will be kept in the researcher's home sage until the thesis has been accepted; then all data will be destroyed.

6. Assure subjects that they are at minimal risk on an individual basis, as group consensus will be sought in the session.

7. Inform participants that they should perceive no threat or harm from their employing institution as administrative personnel have been informed about and have given their consent to this research and to their participation.

8. Ask participants for their verbal agreement to consent to disclose information on the proposed research.

Appendix I

Working Agenda for the Focus-Group Session

WORKING AGENDA - FOCUS-GROUP SESSION

"Marketing Continuing Education:
Perceptions of Program Planners and Educational Consumers"

This session is the data generation component of the qualitative (phase 1) methodology in the two-phase design approach used for the study as outlined in Chapter 3 of the researcher's thesis proposal.

March 13, 1996
9:00 a.m. - 4:00 p.m.
McKay Avenue School
10425 - 99 Ave.
Edmonton, Alberta

8:30 a.m. Facilitator and researcher
* set up room
* review research and ethical procedures

9:00 a.m. Focus-group session commences

Researcher greeting

Facilitator:
* self-introduction
* participant introductions
* role definition: participant, facilitator, researcher
* ethical guidelines
* verbal consent or participants to disclose
* review of two page summary of research
* questions

9:20 a.m. Research questions

10:30 a.m. Break

10:40 a.m. Research questions

12:00 noon Lunch

1:00 p.m. Research questions/organization of data

2:30 p.m. Break

2:40 p.m. Organization of data

4:00 p.m. Conclusion of session

Appendix J

Focus-Group Guide

THE FOCUS-GROUP GUIDE

ROLES AND RESPONSIBILITIES for the FOCUS-GROUP SESSION

1. The RESEARCHER will be present in the role of observer only. The researcher will take notes on observations throughout the session. Following the session, the researcher will debrief with the facilitator and remove all written information from this location in order to begin the questionnaire generation.

2. The PARTICIPANTS will provide their perceptions in response to the research questions and will assist the facilitator in the organization of these responses.

Participants were chosen because they met the following criteria:

a. Each individual has worked for the institution;

b. Each individual has worked as a program planner for at least 4 years;

c. Each individual has planned programs in more than one area of general interest;

d. Each individual has been involved in some aspect of marketing their programs;

e. Each individual has experience with the process of working within this type of group activity;

f. Each individual has well developed verbal communication skills; and

g. Each individual has agreed to be involved in the focus-group session on a volunteer basis.

3. THE FACILITATOR will facilitate the session, ask the questions, initiate and facilitate discussion. The facilitator will provide all written data and a verbal debriefing to the researcher following the session. The facilitator was chosen on the basis of the following criteria:
a. Educational background and training:
- university education at a Masters level
- facilitator training at a post-secondary institution
b. Amount of facilitation experience:
- at least two years experience in an educational setting
c. Personal characteristics:
- expressive, animated, sense of humour, insightful, flexible and able to express thoughts clearly, and
d. Authority:
- experience with effective monitoring and guiding sessions for maximum data generation.

RESEARCH QUESTIONS

OVERVIEW

The research questions provide direction in pursuing the problem that this research addresses, which is:

TO IDENTIFY PERCEPTIONS OF PROGRAM PLANNERS AND EDUCATIONAL CONSUMERS AS TO WHAT CONSTITUTES EFFECTIVE MARKETING FOR General-interest PROGRAMS IN A CONTINUING EDUCATION UNIT OF A PUBLIC SCHOOL BOARD IN ALBERTA.

Data generated from the focus-group session of program planners will drive the creation of the questionnaire to be delivered to the educational consumers.

THE QUESTION CATEGORIES

There are a total of 9 questions in 4 categories:

CATEGORY 1 - Structured

4 are highly structured to elicit essential information concerning the four Ps of the marketing mix: program, price, place and promotion.

CATEGORY 2 - Unstructured

2 are highly unstructured leading questions to allow for group members to engage creatively in their answers.

CATEGORY 3 - Closed

2 are closed questions which should elicit a yes/no answer and some discussion.

CATEGORY 4 - All encompassing

1 is an all encompassing question which will call for conclusions on the part of participants.

The questions will be presented in order from 1 to 9.
Questions 1-4 will be presented first; and discussed at the end of the session.
Questions 5-9 will be presented and discussed during the same time frame.
Several facilitative techniques will be used.
Participants will use: stickies, 5" x 8" cards, 8" x 14" paper, and flip chart paper.
2 thinking walls will be established.

THE NINE QUESTIONS

Notes on data collection for questions 1- 4: generate stickies, 1 per data item, use different colours for each question; stick on flip chart in any order under correct question.

QUESTION 1

When marketing your programs, what do you think is most important to communicate to your educational consumers about the program itself?

Prompts (if necessary):
Length, time of day, day of week, one day or several, quality of instructor or curriculum, what will it do for the consumer (in their life, work), who is running the programs, location, accessible, affordable.

QUESTION 2

When marketing your programs, what do you think is most important to communicate to your educational consumers about the price?

Prompts (if necessary):
Affordable, discounts, value for product received, apples to apples, higher price perceived as better value, lower price perceived as less value, GST, tax deductible, fair.

QUESTION 3

When marketing your programs, what do you think is most important to communicate to your consumers about the place where your programs are delivered?

Prompts (if necessary):
Adult sized tables and chairs, good equipment, state of the art equipment, safe location, school maps, addresses, parking,
wheel chair accessible, clean, staff present to help consumer locate rooms, will lit, symbolic (institution based), image, regional or central, in your neighbourhood.

QUESTION 4

When marketing your programs, what do you think are the most effective types of promotional activities?

Prompts (if necessary):
5 categories: advertising; publicity; face-to-face communication;
atmospherics; incentives.

1. Advertising (paid communication)
Brochures, flyers, calendars, direct mail, media advertising: paper, radio, T.V., billboards.
2. Publicity (unpaid communication)
Perceived as more truthful, from institution, from individual program planner.
3. Face to face
Salesperson, individual program planner, two-way message
4. Atmospherics
Institution positions itself.
5. Incentives
Discounts, 2 for 1, 2 for less, bring a friend.

All encompassing prompts: buckshot v. rifle approach, target marketing

QUESTION 5

What marketing strategy do you feel will be the most successful in attracting educational consumers to your courses?

Notes: May choose from any of the factors identified in the four Ps; or pull from/generate from your own experience and perceptions.

Notes on presentation: 5x8 cards, felt pen, gum, flip chart paper, post with gum.

QUESTION 6

What marketing strategy do you feel will be the least successful in attracting educational consumers to your courses?

Notes on presentation: generate a list on stickies; one factor per sticky, put on flip chart paper.

QUESTION 7

Do you think different marketing strategies are required for different age groups?

Note: Seek discussion

Fact: more seniors are registering in CES now: demographics, discounts? What brings them to us now and what will in the future?

Notes on presentation: group work, 2 groups, brainstorm, create master list, do 2 flip charts

Note: use as thinking frame the age groups of: teens; young adults (20-35); adults (36-54) and seniors (55 +)

Call for VOTE: yes/no

Discussion

QUESTION 8

Do you think different marketing strategies are required for each gender group?

Note: Seek discussion

Fact: 75% of all those who register in CES are female—and this is a fact for most continuing education institutions.

How can we get more males to register?

Notes on presentation: Brainstorm; different groups; master list m/f on flip chart, debrief

VOTE: yes/no
QUESTION 9

What do you think attracts educational consumers to the general-interest programs in this institution instead of another continuing education institution or private competitor?

Note: Let discussion flow

Notes on presentation: think, pair-share, present; on flip chart paper.

ORGANIZATION OF DATA

The final organization of the data for questions 1-4 will take place during the afternoon portion of this session.

The data will be organized on the "thinking wall" of flip chart paper under each of these questions—this can be facilitated by using the same flip chart sheet and reorganizing the individual cards (or stickies) in the following way:

1. A final clustering will be facilitated by the four original pairs of program planners who will explain their analysis to the whole group.

2. The facilitator will then coordinate the efforts of the group in order to reach a consensus for each question for the inclusion of these clusters in the ranking procedure.

3. The facilitator will then explain the ranking procedure.

4. The program planners will rank the clusters for perceived importance according to their own individual perceptions.

5. Flip chart sheets will be preserved in this state for the researcher who will physically remove them from the session. These will provide a major source of information for the creation of the questionnaire.

Appendix K

Letter to Course Instructors

Dear Course Instructor:

Your class has been chosen from the Spring Session Continuing Education Services general-interest courses to participate in a research study on marketing in Continuing Education. You can assist us by distributing the questionnaire enclosed in this envelope to the students attending today's class. All instructions to the students are provided on the front page of the questionnaire. **HOWEVER, PLEASE REITERATE TO THE STUDENTS THAT PARTICIPATION IS TOTALLY VOLUNTARY.**

This research has been approved by the Department of Educational Policy Studies, Faculty of Education, at the University of Alberta; and by Continuing Education Services, Edmonton Public Schools. The researcher is Sandra Jewell, a master's student in the Faculty of Education and a Program Manager of Continuing Education Services, Edmonton Public Schools. She is asking you to participate in this research by delivering this questionnaire to your students **BEFORE THE COMMENCEMENT OF YOUR CLASS.** The questionnaire should take about 10 to 15 minutes.

When the questionnaires are completed, please put them back in this envelope, and leave the envelope with the in-school representative.

Thank you for your participation.

Sandra Jewell
Program Manager
Continuing Education Services

Appendix L

Pilot Questionnaire

Dear Course Participant:

Welcome to this class and to an opportunity to take part in a research study. The worthwhile information you can provide by completing the attached questionnaire will enable Continuing Education Services to serve you even better with courses and programs designed to meet your needs.

Attached is a 3 page questionnaire on marketing general interest courses in adult education. Marketing means not just advertising, but what is referred to as the 4 P's of the marketing mix: the Product (or course itself); the Price; the Place you are taking the course; and the Promotional aspects of marketing.

This research has been approved by the Department of Educational Policy Studies, Faculty of Education, at the University of Alberta; and by Continuing Education Services, Edmonton Public Schools. The researcher is Sandra Jewell, a Master's Student in the Faculty of Education and a Program Manager of Continuing Education Services, Edmonton Public Schools. She is asking you to participate in this research by completing this questionnaire before you begin your class today. This should take about 10 to 15 minutes of your time.

Please note that if you do not wish to participate you are under no obligation to do so; and if at any time when completing the questionnaire you feel you would like to withdraw from participation, you may do so at that time.

Your responses will remain anonymous. The questionnaires are not coded in any way, and you are not to place your name anywhere on the questionnaire. The information gathered from these questionnaires will remain anonymous and confidential. Only the researcher and the university staff involved in data analysis will have access to the uncoded data for analytical purposes. The completed questionnaires will be kept by the researcher until final acceptance of the thesis.

The information the researcher is seeking is not of a personal nature, but rather your perception of why you have made a purchasing decision, in other words, why you have registered in this class.

This thesis is slated for completion in the Fall of 1996 and will be available in the University of Alberta Education Library.

If you have chosen to participate please begin. When you are finished, please hand the questionnaire to the instructor, who will place it in the envelope provided.

Thank you for your time.

SECTION I - CHECK ALL THAT APPLY

Please check all those criteria you feel **persuaded you** to choose this course at Continuing Education Services, rather than a similar course at another educational institution.

- ☐ Accessible location
- ☐ Comfortable atmosphere
- ☐ Reasonable price
- ☐ Quality instructor
- ☐ Reputation of Continuing Education Services
- ☐ Ease of registration
- ☐ Promotion
- ☐ Only offered through this Continuing Education Services
- ☐ Content of course
- ☐ Associated with a School Board

SECTION II - PROVIDE RATINGS

- In this section you are asked to provide ratings for the top 5 features in each question according to how important you feel they are to you. Enter the numbers 5, 4, 3, 2, and 1 one time only in the boxes provided. Leave all other boxes blank.
- Of these numbers, 5 is the largest and is considered the most important; 1 is the smallest and the least important. In order of importance these numbers are 5, 4, 3, 2 and 1.
- Where there are more boxes than numbers, please **REMEMBER TO USE EACH NUMBER ONLY ONCE**. Blank boxes are therefore of less importance than the #1.

EXAMPLE

If you are shopping in a clothing store. How important to you are the following features of that store?

- [3] Friendly service
- [4] Fair return policy
- [5] Good prices
- [ ] Lighting
- [2] Items on sale
- [1] Interact available

PLEASE PROVIDE RATINGS (5, 4, 3, 2, 1) FOR THESE QUESTIONS.
Review all items in a question before providing your ratings.

1. How important were the following features of the price when you decided to register in this course?

- ☐ Value for the money
- ☐ No tax dollars support this course
- ☐ Price versus another provider's price
- ☐ Other (Please specify and rate) _____
- ☐ Other (Please specify and rate) _____
- ☐ Other benefits/value included
- ☐ Payment options
- ☐ Discounts

2. How important were the following features of the place (location) when you decided to register in this course?

- ☐ Convenience of location
- ☐ Suitability of classroom for adults
- ☐ School staff/signs available to give directions
- ☐ Other (Please specify and rate) _____
- ☐ Other (Please specify and rate) _____
- ☐ Parking
- ☐ Safety

3. How important were the following promotional methods in attracting you to register in this course?

- ☐ Target marketing (a brochure about this course)
- ☐ Class Calendar
- ☐ T.V., Radio
- ☐ Newspaper advertisements (paid)
- ☐ Other (Please specify and rate) _____
- ☐ Other (Please specify and rate) _____
- ☐ Personal contact from Continuing Education Services
- ☐ Word of mouth from another registrant
- ☐ News articles in the paper

4. How important were the following features of the course itself (the product) when you decided to register in this course?

- ☐ Content is current and timely
- ☐ Opportunity to build skills
- ☐ Opportunity for self-fulfillment
- ☐ Reputation of instructor
- ☐ Opportunity to socialize
- ☐ Accessible location
- ☐ Other (Please specify and rate) _____
- ☐ Other (Please specify and rate) _____
- ☐ Certificates offered
- ☐ Teacher/Student Ratio
- ☐ Day of the week course was offered
- ☐ Time of day course was offered
- ☐ Reputation of Continuing Education Services

SECTION III - WRITE SHORT ANSWERS

Please provide a short answer to both of these questions on marketing strategy. Note: A marketing strategy can include features of the course (product), price, place and promotion in any combination.

1. In your own words, what marketing strategy do you feel is the most successful in attracting you to these general interest courses?

2. In your own words, what marketing strategy do you feel is the least succesful in attracting you to these general interest courses?

SECTION IV - PROVIDE DEMOGRAPHICS

Check one item in question 1 and one item in question 2.

1. I am:

   Male _____ Female _____

2. I fit within the following age group:

   Under 20 _____ 21-35 _____ 36-49 _____ 50-64 _____ 65+ _____

THANK YOU FOR YOUR PARTICIPATION!

Appendix M

Field Test and Final Questionnaire

Dear Course Participant:

Welcome to this class and to an opportunity to take part in a research study. The worthwhile information you can provide by completing the attached questionnaire will enable Continuing Education Services to serve you even better with courses and programs designed to meet your needs.

Attached is a 3 page questionnaire on marketing general interest courses in adult education. Marketing means not just advertising, but what is referred to as the 4 P's of the marketing mix: the Product (or course itself); the Price; the Place you are taking the course; and the Promotional aspects of marketing.

This research has been approved by the Department of Educational Policy Studies, Faculty of Education, at the University of Alberta; and by Continuing Education Services, Edmonton Public Schools. The researcher is Sandra Jewell, a Master's Student in the Faculty of Education and a Program Manager of Continuing Education Services, Edmonton Public Schools. She is asking you to participate in this research by completing this questionnaire before you begin your class today. This should take about 10 to 15 minutes of your time.

Please note that if you do not wish to participate you are under no obligation to do so; and if at any time when completing the questionnaire you feel you would like to withdraw from participation, you may do so at that time.

Your responses will remain anonymous. The questionnaires are not coded in any way, and you are not to place your name anywhere on the questionnaire. The information gathered from these questionnaires will remain anonymous and confidential. Only the researcher and the university staff involved in data analysis will have access to the uncoded data for analytical purposes. The completed questionnaires will be kept by the researcher until final acceptance of the thesis.

The information the researcher is seeking is not of a personal nature, but rather your perception of why you have made a purchasing decision, in other words, why you have registered in this class.

This thesis is slated for completion in the Fall of 1996 and will be available in the University of Alberta Education Library.

If you have chosen to participate please begin. When you are finished, please hand the questionnaire to the instructor, who will place it in the envelope provided.

Thank you for your time.

SECTION I - CHECK ALL THAT APPLY

Please check all those criteria you feel **persuaded** you to choose this course at Continuing Education Services, rather than a similar course at another educational institution.

☐	Accessible location	☐	Ease of registration
☐	Comfortable atmosphere	☐	Promotion
☐	Reasonable price	☐	Only offered through this Continuing Education Services
☐	Quality instructor	☐	Content of course
☐	Reputation of Continuing Education Services	☐	Associated with a School Board

SECTION II - PROVIDE RANKINGS

The rankings in order of importance are:

5 Most Important ◄——— 4 ——— 3 ——— 2 ———► 1 Least Important

* Please rank the top five features in each question according to how important they are to you by entering the numbers 5, 4, 3, 2, and 1 in the boxes provided.
* Use all the numbers and use each number only once.
* Where there are more boxes than numbers please leave the remaining boxes blank.

EXAMPLE

If you are shopping in a clothing store. How important to you are the following features of that store?

[3]	Friendly service	[4]	Fair return policy
[5]	Good prices	☐	Lighting
[2]	Items on sale	[1]	Interact available

PLEASE PROVIDE RANKINGS FOR THESE QUESTIONS.

Review all items in a question before providing your rankings and then rank your responses with the numbers 5, 4, 3, 2, 1 in the boxes provided. REMEMBER TO USE ALL THE NUMBERS, AND USE EACH NUMBER ONE TIME ONLY. Leave remaining boxes blank.

1. How important were the following features of the price when you decided to register in this course?

- ☐ Value for the money
- ☐ No tax dollars support this course
- ☐ Price versus another provider's price
- ☐ Other (Please specify and rate) _____
- ☐ Other (Please specify and rate) _____
- ☐ Other benefits/value included
- ☐ Payment options
- ☐ Discounts

2. How important were the following features of the place (location) when you decided to register in this course?

- ☐ Convenience of location
- ☐ Suitability of classroom for adults
- ☐ School staff/signs available to give directions
- ☐ Other (Please specify and rate) _____
- ☐ Other (Please specify and rate) _____
- ☐ Parking
- ☐ Safety

3. How important were the following promotional methods in attracting you to register in this course?

- ☐ Target marketing (a brochure about this course)
- ☐ Class Calendar
- ☐ T.V., Radio
- ☐ Newspaper advertisements (paid)
- ☐ Other (Please specify and rate) _____
- ☐ Other (Please specify and rate) _____
- ☐ Personal contact from Continuing Education Services
- ☐ Word of mouth from another registrant
- ☐ News articles in the paper

4. How important were the following features of the course itself (the product) when you decided to register in this course? (Remember to use all the numbers, and use each number one time only, leave remaining boxes blank.)

☐	Content is current and timely	☐	Certificates offered
☐	Opportunity to build skills	☐	Teacher/Student Ratio
☐	Opportunity for self-fulfillment	☐	Day of the week course was offered
☐	Reputation of instructor	☐	Time of day course was offered
☐	Opportunity to socialize	☐	Reputation of Continuing Education Services
☐	Accessible location		
☐	Other (Please specify and rate) _____		
☐	Other (Please specify and rate) _____		

SECTION III - WRITE SHORT ANSWERS

Please provide a short answer to both of these questions on marketing strategy. Note: A marketing strategy can include features of the course (product), price, place and promotion in any combination.

1. In your own words, what marketing strategy do you feel is the most successful in attracting you to these general interest courses?

2. In your own words, what marketing strategy do you feel is the least successful in attracting you to these general interest courses?

SECTION IV - PROVIDE DEMOGRAPHICS

Check one item in question 1 and one item in question 2.

1. I am:
   Male _____ Female _____

2. I fit within the following age group:

   Under 20 _____ 21-35 _____ 36-49 _____ 50-64 _____ 65+ _____

THANK YOU FOR YOUR PARTICIPATION!

Appendix N

Courses Included in the Study

Courses Included in the Study

DATE	CLASS	SUBJECT	AREA	#	#
June 7	Therapeutic Touch	Wholistic C.	N (SH)	10	8 (1)
June 7	Floral Level	Floral	C (OAB)	20	8
June 8	Massage/Couples	Massage	N (SH)	8	7
June 8	Proofreading	Business	S (HA)	8	7
June 8	Flower Power	Photography	S (HA)	5	3
June 8	Performance App.	Business (HR)	C (DWN)	5	4 (1)
June 8	Case Management	Careers	C (DWN)	7	5
June 9	Reiki	Wholistic C	N (SH)	10	9
June 10	Standard 1st Aid	First Aid	S (HA)	9	5 (4)
June 10	Interpersonal SK.	Business	C (DWN)	18	12 (2)
June 10	Microcomp. Scared	Computers	N (SHB)	7	6 (1)
June 10	Microsoft Office	Computers	C (DWN)	9	7 (1)
June 10	Windows 3.1	Computers	N (SH)	6	4 (1)
June 10	Windows 95	Computers	C (DWN)	4	4
June 10	How to Sing	Music	W (WES)	6	6
June 10	Ballroom Dance	Active Living	S (WPK)	14	12 (2)
June 10	Spanish	Languages	W (RSH)	10	8 (1)
June 11	Speed Reading	Business	C (DWN)	10	7
June 11	Internet Intro	Computers	C (DWN)	10	7
June 11	Internet Intro	Computers	C (DWN)	8	6
June 11	Executor	Law	C (SRSR)	9	8
June 11	Pregnancy Massage	Massage U.	N (SH)	10	9 (1)
June 11	Brain Gym Srs.	Wholistic GI	N (SH)	8	6 (2)
June 11	Health Chi Gong	Wellbeing	S (BDC)	15	13 (1)

DATE	CLASS	SUBJECT	AREA	#	#	
June 11	Visual Display	Business	C (VIC)	5	4	
June 11	Garden Design	Gardening	W (RSC)	8	5	(1)
June 11	Oil Painting	Art	S (HAR)	7	7	
June 11	Sign Lang	Sign Lang	C (VIC)	6	4	
June 11	Japanese	Languages	W (RSH)	8	8	
June 12	Remember Me	Business	C (DWN)	10	8	(1)
June 12	Reflexology	Wholistic	S (HAC)	10	7	(1)
June 12	Linedance	Active Liv	E (WPW)	14	12	
June 12	Belly Dance	Active Liv	C (VIC)	10	6	(2)
June 12	Art of Writing Well	Creative Writ	S (HAC)	10	9	(1)
June 13	B.Gym	Wholistic	S (HAC)	8	7	
June 13	Tarot	New Age	N (SHB)	6	4	
June 15	Newsletter Wkshp.	Business	S (HAC)	9	8	(1)
June 15	Computers	Computers	C (DWN)	8	6	
June 15	Effective Workshops	Workplace T.	C (DWN)	5	5	
June 15	Making Minutes	Business (Sec)	C (DWN)	20	12	(2)
June 15	Powerpoint	Computers	N (SHB)	7	6	(1)
				377	289	(28)

TOTALS

TOTAL DISTRIBUTED	377
TOTAL RETURNED COMPLETED CORRECTLY	289
TOTAL RETURNED INCOMPLETE	28
TOTAL AVAILABLE FOR DATA ANALYSIS	317
TOTAL RETURNED BLANK	52
TOTAL NOT RETURNED	8

Appendix O

Most and Least Successful Strategies:

Section III Responses From the Questionnaire

Section III Responses From the Questionnaire

General Comments

"Use as many methods as possible," "Your advertising is very effective," and "CES is well known and well marketed."

Promotion

Responses in the promotion section were further broken down into the following classifications. They are presented here with some of the comments to provide a feeling for the flavour of the responses.

1. Class calendar (as promotion) (168)
- look forward to it coming each session so I can look over it at my leisure
- its always mailed to my home, in the paper
- it is the most successful and effective tool you have
- it is well known and well organized
- it is available at Safeway stores, libraries, Doctor's offices, banks, and at funding agencies and the government
- excellent without a doubt
- easily accessible and free!
- it is easy to compare your offerings to others with this calendar
- I always look through it to see what is new
- it is the only one I know of!

2. Quality of Class calendar (98)
- easy to understand, well organized, clear, concise and good descriptions including content and price of courses (69)
- benefits highlighted appeals to job finding, additional training, skill enhancement (20)
- fun, catchy, interesting, always something new, creative (9)

3. Word of mouth from a friend or previous participant (23)

4. Newspaper articles—not ads—including papers outside of Edmonton (11)

5. Instructor quality/contact (6)

6. Inservice Catalogue (4)

7. Mail out list of new courses with receipt (4)

8. Other brochures (3): massage

9. Taken previous course (3)

10. Ads on billboards remind me to get the class calendar (3)

11. Personal service—CES staff well organized, know about courses, good response to phone inquiries, call me re new levels (4)

12. Target seniors (2)

13. T.V. ads (4)

14. Newspaper ads (2)

15. Radio (1) Educational T.V. (1) Educational Inserts (1) Phone Contact (1) T.V. news items (1) Fax (1) Ads on buses (1)

Product

Responses which fell under the "p" of product (164) produced the second highest generation of items. One general comment noted: "The content of CES courses is relevant and applicable unlike other courses which include too much theory."

1. Content (78)
- short and skill laden (13), relevant and applicable (13), current and timely and with the trends (12), business/career/job enhancing (11), lifelong learning / self-fulfilling (10), fun and exciting/fun to go with someone (8), meets my needs (7), new (6).

2. Time of day/Day of week (30)
- convenience, fits my schedule (16)
- range of times/days offered is important (6)
- need evenings (2), Saturdays (2), Daytime (2), 1 evening a week good for working people (1), 1 day better than 2 evenings (1)

3. Instructor (20)
- reputation, written up or listed, known about, donates fees (20)

4. Wide Range and Variety of Courses (9)

5. Certificates (8)
- certificates themselves (6)
- courses packaged within larger framework lead to certificates and encourage me to take more courses (2)

6. Ease of Registration Options (6)

7. Quality—Good Products at a reasonable price (6)

8. Opportunities for special populations (5):
- couples (2)
- families (1)
- seniors (2)

9. Reputation of CES (2)

Place

Responses were sparse for Place (36). These included:

1. Accessible (11)

2. Central location (7)

3. More places like CES Downtown (6)

4. Parking (U of A a problem) (4)

5. Safe (3)

6. Offer in more than 1 location (3)

7. On LRT (1)

8. CES chooses places that match needs of courses (1)

Price

The responses which clustered under price (67) provided an interesting look at what educational consumers thought about the pricing of general-interest courses. The following comments reveal some of this thinking. "Give me what I'm paying for and I'll be back." "If someone is looking for a course such as this, anything will work provided you give more value for the cost than the competitors." "Keep offering courses at these prices."

1. Cost reasonable/affordable (28)

2. Competitive prices (17)
- your prices are better

3. Value for $ (7)

4. Payment options (4)

5. Tax deductible (4)

6. Discounts (3)

7. Special prices: seniors (3), couples (1)

Least Successful

Promotion (149)

1. T.V. ads and commercials (45)
- don't watch, waste of time

2. Radio (33)
- never listen to, annoying

3. Newspaper ads (25)
- don't read paper, don't read advertising, doesn't allow comparisons or enough information

4. Hard sell : Direct call sales promotion (13). "Aggressive radio/tv campaign leaves impression of high attendance and profit as a goal rather than course quality, (2); weird hype and excessive promo as to how good course is (2)

5. Not mailing out the class calendar to former students (2)

6. Brochures and Flyers (9) especially flashy expensive ones

7. Ads addressed to me by mail (3)

8. Newspaper inserts, multimedia ads, vague newspaper articles,

9. Class calendar

10. Billboards (3)

11. No other marketing strategy than CC

12. Personally addressed mail—I throw them out

13. Word of Mouth (2)—never had any

14. Infomercials, paid ads (2)

15. Fax

16. Incomplete poster style promo

Product (22)
- not knowing for sure what course content is (8)
- if not looking for a course like this nothing will attract you
- poor scheduling (4) eg never night course for seniors
- not getting what course promises
- socializing as a benefit (2)
- instructor's name not mentioned (5)
- description of course doesn't mention benefits
- certificate nice but didn't draw me in

Price (17)
- too pricey (17)

Place (28)
- too far from home, too hard to get to (18)
- poor, dirty classrooms (2)
- difficulty in finding classroom once I get to schools (5)
- too many participants in a public space
- won't go to (particular school) re bad experience (2)

Appendix P

Responses Generated from Options 1 & 2 in Section II of the Questionnaire

Responses Generated from Options 1 & 2 in

Section II of the Questionnaire

These responses are recorded with the ranking number assigned by the educational consumer to the options noted in brackets. Responses are summarized per question, with no notation if option 1 or option 2 was completed.

Price

* Income tax deductible (5) (5) (4) (4) (3) (3)
* Paid by employer (5) (5) (5) (5) (4) (3)
* Paid by school board (internal students) (5) (5) (4) (4) (2)
* Part of a certificate (5) (5)
* Course content great for the money (5) (4)
* Reasonable price (5)
* Convenient time of payment (4)
* Had the money at the time (4)
* Price not an issue (2)
* Cancellation Policy (ease of getting refund) (2)
* Rate lower than private company (1)
* Couples discount (1)
* Affordable (1)
* I had the money at the time (1)

Place

* Familiar area (5)(3) (3) (3) (3) (2)
* Only location not likely to cancel (5) (5)
* Familiarity with building (2) (1)
* Location not a criteria (1) (1)
* Location is my top priority (5)
* On Bus/LRT route (4) (4) (2) (2)
* In Edmonton (3) (1)
* Has a cafeteria (4)
* Easy access to highway (3)
* Downtown location (3)
* Can go outside for lunch (2)

Promotion

* Heard about course from external source: Learning in the Fast Lane Conference (Edmonton Public Schools) (3); In my doctor's office (5); Health Care Workers Referral Center (5)
* Instructor told me (5) (5) (5) (4) (4) (3) (1)
* Friend told me (5)(5)
* Information from previous course (5) (4)
* Phone call I made to CES (4) (4)
* CES has a good reputation (4)

* Course descriptor sounded great! (4)
* Inservice news to teachers (5) (4) (3)
* Only place I saw the course (2)
* Billboard sign (1)

Product

* Only one offering the course (5) (3)
* Actual day of course (5) (4) (3) (1)
* This is my focus at this time of my life (5)
* Taken your courses before (5)
* Needed course to learn to dance for my son's wedding (5)
* Length of course (4) (3)
* Hands on aspect (4)
* Computer course for beginners - so I wasn't afraid (2) (1)
* Course descriptor said only older students (4) (3)
* Meet people (3) (2)
* Going with a friend (1)
* Couples (3)
* Further my education (2)
* Class size (2)
* Hours of course per week (2)